

Exploring a Designed Liminality Framework:

Learning to Create Future-Orientated Knowledge

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B. Arts (Sociology), B. Arts (Community Development)

**This thesis is presented for the degree of
Master of Philosophy (Strategic Management)**

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Declaration

I declare that this thesis is my own account of my research and contains as its main content work which has not previously been submitted for a degree at any tertiary education institution. All necessary ethics and safety approvals have been obtained (Murdoch University Ethics 2013/097).

Gabrielle Mary Walker

November 2019

“Understanding the creative process is
the foundation for mastery in all fields.”
~ *Peter Senge*

“The future is a creative act, and like
any creative act, the tools are as
essential as the process. The past will
be our future until we have the courage
to create a new one.”
~ *Erwin Raphael McManus*

Abstract

The anthropological theory of liminality is increasingly entering discussions surrounding complexity in contemporary organisations, although conversation continues to be shrouded in anthropological intellectualism and scholarly debate. Liminality is represented by a three-tiered liminal framework and is an intense iterative change process documenting people's movement from a state of relative structure to a new state of development. Despite incremental movements towards a practice-orientated discussion, liminality is not currently readily translatable from its anthropological origins to meet organisational needs. Indeed, research remains focused on discrete aspects of the liminal concept and debates focus on precise definitions, rather than how best to establish or facilitate a safe and relevant contemporary liminal experience.

This research collates, synthesises and articulates the parameters of a practice-based liminal framework. Scenario planning was identified as a reliable crucible for a pursuit of a practice-based liminal framework, as an established collaborative strategic planning practice with many real-life facilitator accounts of transformative outcomes in businesses. When practiced with the purpose of challenging mindsets, scenario planning facilitators purposefully curate different worldviews. A high degree of turbulence is intentionally provoked to challenge and catalyse cognitive change for groups creating multiple potential futures in foresight spaces.

Despite similarities between scenario planning and liminality, the differences in scholarship, research approach, and rhetoric necessitated that this research occurs at a mid-point between organisational studies and the social sciences. The overarching guiding research question was: *What are the foundations of a practice-based*

framework for liminal spaces? This question was addressed using an empirical concept analysis approach that drew on extant literature and data from a scenario-informed strategic planning consultancy project undertaken with top management at a nation-wide health care organisation in Australia.

Findings showed that the organisation had pre-existing attributes and a successful designed liminal space was already primed. The organisation has a history of longitudinal strategising, apt risk-taking, and an ability to respectfully engage in difficult and raw conversations. The data also identified how tacit signals from the CEO supported the devolving of his “power” to support the emergence of liminal space. Additionally, internal liminal supporters acted as intermediators supporting the client organisation and consultants, an important component in this contemporary example.

This study contributes to the theory-practice discussion and draws attention to the role of the facilitator and the psycho-social nuances required across a liminal transition. A five-phased designed liminal framework demonstrates how facilitators undertake role changes throughout a project in response to the different cognitive demands from individuals. Facilitators require a range of versatile psycho-social competences to meet individual needs and evoking, challenging, holding and/or enhancing constructive debate in groups requires different competences.

This research contributes to wider debates on liminality practice, tools and competences for facilitators (non-liminars). The findings offer many foundations to future research that will focus on the cognitive needs of creating unique knowledge, and the liminal experience. The framework speaks directly to facilitators who guide groups to create future-orientated knowledge within business contexts. This research

translates to other professional environments where relationships and up-levelling play a role, such as, education, coaching and mentoring.

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Acknowledgments

In more ways than one, this work has required the support of my community. A wave of gratitude goes to Dr. Megan Paull for having been present throughout this entire academic journey. I consider your collegiality and friendship a true gift. You are an authentic leader and have been essential to my ability to navigate the corridors of the Business School and University.

To my supervisor, Professor Peter McKiernan, your academic expertise, fierce commitment and willingness to have real conversations has continually pushed me outside my comfort zone and made this a work I am proud of. I value you allowing me to voyage in my own way through this study.

Dr. Simon Minaee, thank-you for challenging me about the importance of “truths” in the world. You have lifted my writing ability to a new level, and I am grateful for our coffee-fuelled meandering discussions. I am eternally proud of the events we created together for MasterClass and bringing together students, leaders, academics and community. Thank you for allowing me to bring my vision into reality and facilitate discussions on hero’s journeys, women in leadership, creativity, innovation, youth and entrepreneurship. It has been a privilege.

Dr. Scott Gardner, thank-you for your passionate conversations about the future. Your enthusiasm for life has meant a lot to me since we connected in as an eager undergraduate student. Your cross-disciplinary spirit reminded me not to take myself so seriously and to enjoy this journey.

Associate Professor Tracy Reibel, thank you for walking into my office the day I was millimetres away from abandoning this piece. Superwomen aren’t always identified by their capes but their fierce nature, consistent belief in others, transparency and willingness to cut through rhetoric into humanity. You are a Master at your craft

and have taught me *so much* in this short time, and I feel privileged to know you as “the research oracle” you embody.

Dr. Barbara Evers, you were the first person to recognise and foster my academic excitement. You have been a supporter and friend since that time. I want you to know that your initial support will never be forgotten and the academic curiosity you encouraged in me is woven throughout these pages.

To all those who offered their editing, academic expertise or coaching support outside of specific roles: Aimee Sinclair, Alison Braithwaite, Andrea Ross, Bek Tomarchio, Dr. Ian Boudville, Jayne Kotz, Jarna Saunders, Kath Sugars, Melissa Sonido, Natacha Wrenfeldt-Petersen, Renée Gardiner, Richard Beavitt, Sally Steadman, Tim Smith and Wen Chan. Thank you all for having kept me human, grounded and present.

To my Mum, Jillian Walker. You have been my grammaticon, a sounding board for my ever-changing visions of the future as well as walking more than 800km across Spain on pilgrimage with me as I pondered endings and liminal space. My gratefulness is immeasurable. To all the Walker *whānau* Francesca, Jarrad, Annelise, and Dad, Trevor. I lucked out on the tribe I get to stomp through life with.

Last, but definitely not least a deep wave of gratitude goes to the participants whose words are expressed in this research. Rummaging around in the heart of your organisational memories, expertise, and lived experience is a privilege. This study is quietly yours.

Researcher Reflections

We ought to come as close as the true poets do to the yet hidden human possibilities; and for that reason we need to pierce the walls of the obvious and self-evident, of that prevailing ideological fashion of the day whose commonality is taken for the proof of its sense. Demolishing such walls is as much the sociologist's as the poet's calling, and for the same reason: the walling-up of possibilities belies human potential while obstructing the disclosure of its bluff (Bauman, 2002, p.359).

I am at my core an experiential learner and researcher. I learn in a cognitive, physical and energetic way, so it felt important to reflect on some of the epistemological¹ encounters during this academic voyage as a sociologist and a practitioner. I personally need to feel aligned to be compelled to contribute my wisdom and expertise to an organisation, and when I do, I do not need to be manipulated to do so. I find it inspiring that corporate leaders like Angela Ahrendts the former CEO of Burberry (2006-2014) (Ahrendts, 2013) are recognising the potential of human energy. Or that Kevin Roberts, the CEO of the brand agency Saatchi & Saatchi speaks about Lovemarks over marketing, emphasising the potential organisations have to foster mystery, sensuality and intimacy beyond the typical academic narrative (Roberts, n.d.). Their views recognise that individuals make up groups and invites us as business scholars to explore different possibilities for harnessing and sustaining motivation.

¹ In a sociological context, epistemology indicates the means by which conclusions and findings are reached (Abercrombie, Hill & Turner, 2006). E.g. Organisational theorists and sociologists will approach the same context with differences in theoretical training, accepted norms and research questions (epistemology) (Romme, 2003).

My personal practice of facilitation has been challenged throughout this process. When facilitating I prepare a lot and subsequently enter a workshop or retreat space with as much knowledge as possible. I then experience a “surrender” of sorts where the group rides the energy, trusting earlier preparation and training, aiming to let go of any assumptions about what people will speak and create. The ease of “surrender” differs from workshop to workshop with a wide variety of factors coming into play.

I was assured by Peter (my primary supervisor) that as facilitators we are also somewhat caught in the liminal process ourselves (my paraphrase of our lengthy dialogue). In essence, as facilitators we too are inevitably impacted by the space. It is extremely likely we will unexpectedly be challenged, so it is necessary to be adept at responding in an embodied manner. We are not as deeply engaged in the uncertainty as individual participants in the workshops for we “hold” the process. However, any insights or frustrations participants’ voice will likely influence us and may be directed towards us and how we respond can often change the flow of the room. Sometimes, our willingness to be vulnerable enables others courage to grapple with new ideas. The tricky part is knowing that our strengths, weaknesses, blind spots, and heritage do influence the spaces we design, hold, and facilitate.

I first encountered the theory of liminality in an Anthropology unit during my undergraduate degree where I was given an excerpt from the text “The Ritual Process: Structure and Anti-structure” by Victor Turner (1969). The ensuing discussion intrigued me, and the recognition of intersecting individual choice within societal structures resonated with me. In contrast to some of the other theories, liminality recognised the non-linearity of my own lived experience. It addressed

the allure of challenge and agency, while also acknowledging the presence of society's influence on our experiences.

My first attempt to articulate the betwixt-and-between space was in the final semester of my Community Development Degree. I submitted an essay about the liminal position (frustration) of being an external (liminal/ solitary) student in an experiential learning unit Creative Ways of Working with Community.² Unbeknownst to me at the time, my tutor, Richard Beavitt had written his honours thesis on "The Demands of Liminality: Community, Communitas, and Reflexivity." Richard critiqued my work and expanded my thinking. One question hung on my wall:

How can those of us steeped in the "knowing" of a rationalist culture learn to operate in such liminal spaces? How can we move usefully from this way of framing the world that assumes that complexity can be contained?
(Beavitt, 2012, p.2).

Richard, this study has unintentionally become a lengthily response to your question. I hope other researchers sparked by ideas that don't quite fit into concrete boxes (or iron cages) join the conversation.

A number of things happened throughout this candidature that influenced my thinking. Early in my candidature process, I was invited to present at a futures collective forum held by Enkel, Centre for Australian Foresight, and Perth Foresight Café where I shared some preliminary thinking on liminality. Following my presentation, the attendees, mainly engineers and practitioners, spent time deconstructing, questioning, and critiquing the concept of liminality from a futurist

² I later applied the liminal phases to teaching shared Australian history to predominantly non-Aboriginal students as a non-Australian educator (Walker, 2015a); and introduced the concept to discuss the overlaps between spiritual awakening and mental health diagnoses (Walker, 2015b).

perspective. I am indebted to the insight I received from the expertise and discussion around the many gaps in moving from theory to practice.

Another significant shift in my thinking regarding the design of liminality was one of a more practical concern that occurred in a discussion with Landgate about their nearly decade-old Innovation Program. Landgate was/is mapping an innovative and strategic space for their organisational position in the future and have developed clarity of the intersection between the conceptual application and real-life practice of nurturing change. These conversations provided me with much food for thought about the “on-the-ground” impacts futures thinking and “theories,” like liminality, have on those who are not directly involved in the decision-making processes.

Undertaking this research, I came across a number of different rites of passage organisations already drawing on liminality in their practice. I attended a “Rite of Passage Facilitator training” with “AdventureWorks WA” (AW) on the 12-14 May 2017, which greatly fostered my thinking surrounding tangible liminality tools. AW is an adventure company that works with teenagers, largely in outdoor settings and providing physical, cognitive and social challenges supporting a future-transition from youth into adulthood (Adventureworks WA, 2018). Facilitators are “tribe members” who take a role as adult peers for young people outside of their familial or educational relationships. My observations of the AdventureWorks WA Team in a *communitas* context has expanded my concept of the power we have as facilitators when the mixture of strong leadership and vulnerability is “just right.” Mary, Scottie, Marni, Fish, Millie, Darren and Mike you have each modelled non-liminal facilitation in a unique way that demonstrates how impactful well-placed vulnerability can be. I’m grateful you are all sharing this knowledge for our next generation.

During the training, tribe members facilitated a discussion around how to inspire optimal student engagement, leading to questions around how we “measure” success as facilitators. This highlighted the different expectations each facilitator can bring into a space. I learnt that keeping oneself in check as a facilitator is important. It is so easy to place assumptions on people’s boundaries and capacity for growth. Human potential is beyond what we are capable of measuring. For one young person, throwing themselves off an abseiling tower could be easy, whereas, speaking in a group could be deeply challenging for another person. As facilitators, we may measure our own success based on participant reactions or feedback. This training and subsequent discussions with people who attended this training made it apparent that questioning the relevance of challenge and a capacity to weave play into the process is essential.

In a scholarly capacity, I recognise that there is some valuable research emerging from the threshold concepts space that did not exist when I began this research in 2013. This necessitated that I build and develop the foundational argument for the study without such insight. I am excited to see where this and other emerging findings direct this field, with designed liminality finding a space amidst this discussion.

Finally, this study has been a contemporary rite of passage in itself. As a creative first and foremost, I had some difficulty completing the third and final liminal stage and reaching completion. I found it challenging that as practitioners and researchers examining a business culture we readily challenge the organisations we consult for. We ask them to think bigger and into the future, yet

do not always interrogate our research norms.³ This study explores unasked questions, examines untested assumptions and gives voice to neglected views. Not allowing space for exploration of the psycho-social in the research process runs the risk of abandoning or making invisible creativity or otherworldliness, and succumbing to linear generalisations as ‘truth.’

Had I known the depth and scope of professional and personal transformation awaiting me, I may not have taken the first step. I truly echo van Gennep’s sentiment when he said:

Rites de Passage is like a part of my flesh, and was the result of a kind of inner illumination that suddenly dispelled a sort of darkness in which I had been floundering for almost ten years (cited in Belier, 1994, p.146).

If you are reading this, I hope you sense the vibrations and reverberations. In many ways, this research has forever changed how I share my energy. It has influenced how I facilitate and how I aspire to co-create with others in this lifetime. In the past, in the present, and in the future; whether you guide me or allow me to guide you. I am eternally grateful.

³ Norms are expectations, common guidelines and “appropriate conduct” informing social action. Norms are usually internalised and are not always identifiable by the people within a culture as people widely accept these as “truth,” but norms are often obvious to foreigners or travellers who were not raised within the same social expectations (Abercrombie et al., 2006, p.272).

This is for those who are willing to enter into the unknown liminal
spaces in their professional lives.

To those who facilitate magic, business, adventure, risk,
information, strategy, and community within contemporary
environments.

Your willingness to work in spaces outside strict categorisation is
so valuable to the evolution of our practice, and our world.

Chapter 1: Introduction

Between-and-between and liminality are two terms used when change, transition and uncertainty are afoot. The research is an intersection of theory and practice that considers the value of a full intentional process of liminality. This chapter provides guidance and an overview of the study commencing with a distillation of the research significance and contribution. The research problem is framed, and the aims and questions guiding this research are provided. Two research areas are used comprehensively within this study: 1) liminality and 2) scenario planning. These are introduced, and the methodology of this exploratory research project is presented. Finally, the structure of the study is presented, outlining key elements from each chapter.

This study argues that liminal theory has the potential to inform the design and facilitation of transformative spaces⁴ in organisations; and that organisational practices have the capacity to inform a robust liminal practice. Liminality is represented by three phases: 1) *separation* from the norm; 2) *liminality*, the middle stage where real change becomes possible, and 3) *re-integration* or moving towards a new state of structure, or 'normality' (Carson, 2016). The middle liminal phase is an intense iterative experience of change whereby people move from a state of relative structure to a new state of development (Turner, 1977). These periods demand the challenges associated with growth and necessitate people face their limitations to enter new cognitive, emotional or physical territory. The combination of growth and challenge make liminal spaces potent and this potency

⁴ The term 'space' is used throughout this research and indicates the different cognitive, physical and emotional arenas attached to different contexts or activities. Recognising that there are "... diverse forms of spaces within the life and life world" (Savin-Baden, 2008, p.75).

contributes to the instigation of significant changes in people's worldviews, behaviours and actions (Savin-Baden, 2008).

The translation of theory-orientated liminal research relevant to organisational practice still requires clarification within the literature. Organisational liminality continues to seek an identity as a discipline (Cross, Kinnie, & Swart, 2015; Söderlund & Borg, 2018). Liminality does not fit comfortably into organisational research with many of the anthropological ethnographic customs at odds business objectives (Romme, 2003). Tentative steps are being taken towards examining how to design or facilitate liminality with specific desired outcomes in mind (Timmermans & Meyer, 2017).

To help narrow this gap, scenario planning was identified as an established and comprehensive strategic planning practice reporting similarities to liminal experiences. This study maps a 'real-life' scenario-informed strategic planning project.⁵ The overlaps between the two fields warranted an interdisciplinary examination of a liminal practice within the context of scenario planning. Scenario planning is purported to challenge people's cognition and groups come together to envision the future using relational tools and activities. Scenario planning actively uses imagery and symbols to communicate different organisational narratives (Tyler, 2006), and encourages paradox through strategic conversations (van der Merwe, Chermack, Kulikowich & Yang, 2007). The field contains a robust body of work documenting the design, evolution and ongoing validation of the method (Cornelius, Van de Putte & Romani, 2005; van der Heijden, 2011). Further similarities between liminality and scenario planning include reports of participants demonstrating

⁵ This study analysed data collected during the scenario development phase of a 'scenario-informed strategic planning project'. The terms 'scenario planning' and 'scenario development' are used interchangeably throughout.

previously unexpressed latent fear, inertia and decisional conflict (Hodgkinson & Wright, 2002; Wright, van der Heijden, Burt, Bradfield & Cairns, 2008).

The study concludes with the presentation of a conceptual practice-orientated liminal framework. The framework considers the development of safe and purposeful transformative spaces using both liminars (participants)⁶ and facilitator's (non-liminar) perspectives. This is a relatively new exploration for organisational liminality.

This is the first time a comprehensive study involving both scenario development and liminal theory has been undertaken.⁷ The confluence of liminality and scenario planning narrates an understanding of the psycho-social factors of facilitating changes in cognition, behaviour and subsequently organisational outcomes. Liminality and scenario planning literature are discussed as separate, yet complementary processes that together inform a comprehensive picture of the psycho-dynamics of change occurring in contemporary organisations.

1.1 Significance and Contribution

This exploratory research has implications for facilitators, leaders and the organisations within which they operate. The research contributes in several ways: First, most significantly it shifts the discussion of liminality from a complex space discussed in a theoretical context, towards considering how the theory is applicable to practice. Second it presents scenario planning as a psycho-social construct, thus expanding the ability to discuss scenario planning outside a methodological practice. Third, a comprehensive review and presentation of the

⁶ Terms for liminal people transiting from one stage to another are: ritual subject, passenger, luminaries, liminal *personae*, or threshold people (Turner, 1969, p.94). This research adopts the term 'individual' or 'group' and uses the phrase 'individual participant' when discussing those involved with the scenario-informed strategic planning workshop.

⁷ Johnson, Prashantham, Floyd and Bourque (2010) and Tyler (2006) have written about the subject.

liminal domains is presented. This table examines and clarifies the lines between the varieties of disciplinary and contextual liminal experiences. Fourth, it offers the first in-depth synthesis of liminality and scenario planning that cumulates in a practice-orientated framework concerning the design and facilitation of liminality. This framework presents a five-phase conceptual theory and focuses on the intentional engagement with transformational spaces. The framework is presented from the perspective of participants and facilitators. Fifth, the liminoid is reconceptualised to meet the contemporary needs of practitioners.

The liminality literature review and synthesis of the liminal literature demonstrates that liminal theory has travelled well beyond its origins in the field of anthropology. Early liminal research observed ritual and ceremonial gatherings, however, is now found in disciplines such as education, events management and organisational studies. The various domains demonstrate that despite liminars experiencing similar disruptive emotions and sensations during the periods of change, there are distinct characteristics depending on the domains. For example, the presence, or lack of presence of facilitators; whether people are prepared to undergo change; and whether changing one's state is supported by the society of culture in which they operate (as with traditional rites of passage). Moreover, theorists are beginning to consider the applicability of their own cultures, rather than through the analysis of others as was typical of anthropological theory.

This research has a point of uniqueness in returning to emphasising the importance of psycho-social theory in scenario planning. It was outlined earlier that very few liminal studies have examined an existing and validated transformative organisational practice. Scenario planning studies have the opposite dilemma. Scenario planning research rarely considers how social science theory may inform the

transformative methodology. Instead studies have typically focused on how best to overcome barriers to practice (Varum & Melo, 2010). Together, each area brings essential components to shifting cognition and creating new and relevant futures. A joint focus on understanding the psychological, social and emotional impacts of strategic intervention benefits both fields in presenting a framework of psychological safety when people are questioning, dismantling, and rebuilding knowledge in groups. The synthesis of scenario planning and liminality has theoretical and practical components that reciprocally enhance each academic area.

This project is one of the first to place a specific focus on the role and competences required to facilitate and participate in intentional liminal space. A five-tiered liminal framework examines the distinct psycho-social demands placed on individuals and groups across a five-tiered liminal transition. It then considers how facilitators can use specific liminal competences⁸ when designing, priming, holding and withdrawing from a project to support quality outcomes. The framework then presents the co-creative relationship experienced between facilitators and participants in any facilitated relationship. Contrary to some literature, the outcomes of a scenario planning project are not dependent on one party's readiness over another. Moreover, responsibility for the success and progression of a project will fluctuate between facilitators and participants during different phases.

It is not too much of a leap to understand that not all scenario planning projects will be liminal or transformational. In this capacity, a distinction is made between the liminoid and the liminal to distinguish optimal and non-optimal environments and engagement when supporting the creation of future-orientated knowledge.

⁸ The word competences, rather than competencies, follows Barley and Kunda's (2011) and Söderlund & Borg's (2018) research on liminal competence.

This research argues that the liminal field, when combined with scenario planning, provides a fresh way to examine and improve upon practice-orientated liminal interventions from psycho-social perspective. This research is situated within a business context, although the findings provide a number of foundations for future research in a variety of areas including coaching, mentoring and those who are instigating and supporting change in contemporary spaces.

1.2 Research Problem and Background

This research occurs at a mid-point between business and social science scholarship. The confluence of liminality and scenario planning research highlighted broad differences in each areas research purpose and focus, which is outlined in more depth in 'section 4.4.1: Research approach and direction' (Romme, 2003). These differences merited attention being given to first developing a lexicon supporting scholarly research between these two fields.

This eventuated in a practice-orientated liminal framework that is applicable to real-life business contexts. Norms from each of the fields were deliberated and decisions were made to support the needs of this synthesis. For example, the detailed descriptions commonly provided by liminal scholars was also abandoned to develop a wider understanding of the competences required to facilitate an iterative and non-linear reality of developing new ideas and concepts. Similarly, the resultant framework moves away from the organisational field's tendency to provide a broad generalisable model applicable to day-to-day operations. The framework does not address mechanisation, but rather, the nuances of priming and supporting uncertainty and creativity (Hagel, Seeley Brown, Wooll & de Maar, 2016a; Romme, 2003).

Both fields have much potential to inform a comprehensive and nuanced

discussion beyond the current disciplinary boundaries and the gaps in each of the fields outlined below.

1.2.1 *Liminality Research Problem*

The core research problem is that the body of liminal research is not currently in a position to inform liminal practice outside of the current traditional theoretical usage. Nor does a map or discussion about creating significant liminal environments currently exist. Four key barriers to bridging theory and practice were identified. First, the continuation of observatory social science research methods and discourse makes it difficult to translate and discuss liminality findings with practice in mind. Second, a lack of understanding exists about the parameters and purposes of intentional liminality in contemporary contexts (Söderlund & Borg, 2018). Third, organisational liminality has many significant tensions and contradictions (Cross et al., 2015; Wright & Hibbert, 2015), this magnifies the lack of clarity about how to begin bridging this theory-practice divide (Davies, 2006). Fourth, limited studies rarely discuss the role of non-liminars (facilitators, guides, coaches) despite facilitators being regularly present in liminal contexts. It follows that research has not examined the facilitator-participant relationship during each of the liminal phases (separation, liminality and re-integration).

The norms set up by anthropological liminality is one of the greatest barriers to considering liminality as a valid practice. Anthropology originated from scholars analysing accounts of Indigenous communities (Turner, 1967; van Gennep, 1909[1909]). Research was undertaken by observing “others” and the premises continue into the present day. Many scholars agree that “...no ‘great divide...’” exists between the characteristics of “so-called pre-modern and modern societies” (Czarniawska & Mazza, 2003, p.271). These origins of a separation between

researcher and researched are difficult to untangle from or as Tanner (2011, p.428) articulates, "...difficulties arise in determining how best to engage both practitioners and academics in a dialogue that is meaningful and valued by both groups." Although it does appear that the rich theoretical findings thus far within liminal research may go underutilised if they are not considered and clarified to understand what they can offer in the modern day.

There is very little research considering the intentional application of liminality in organisational studies, although there are many calls for the translation of liminality from theory to practice. Johnsen and Sørensen (2014, p.322) and that "...in order to be fruitful today, [liminality must] be re-read through the lenses of contemporary thinking." Many theorists have established the potential benefit in exploring a practice-orientated liminal concept. For example, Mäklsoo (2012, p.481) considers there to be "...substantial, yet unrecognised potential for the application of liminality." Hearn (1980, p.309), a sociologist, articulates the need for deliberation and intention in a liminal approach as a viable model:

...the experience of *communitas* is valuable only to the extent that it allows people to bring the desirable and imaginable into line with the possible, and this requires a deliberately formulated program of action with which the fantastic future can be approximated giving the established empirical limits.

Beavitt (2012) a community development practitioner and academic also recognises the benefit from understanding and supporting liminars in their return to their everyday lives:

...if liminality is understood to be an environment which intends to bring about effects in the remainder of our lives, then there is a requirement to

translate what we have learnt in liminal space back into the 'real' world (p.50).

Collins (2005, p.491), critiques the theories validity in not considering the practical implications of such a model:

By ending in spontaneous communitas and avoiding a normative model, the [theory] does not discuss how to mobilize resources and develop systems of social control. This omission, as well as depending on the constructive power of human ritual without recognition of its destructive potential, significantly limits [any theory's] analytic validity.

Those who have considered a liminal framework in a practice-orientated mindset also highlight the need to further the existing work for practitioners, whereby:

... a sense of frustration or bewilderment might set in. What must now be done...? What effect does this 'discovery' have? All of a sudden, there is a new lens through which to reflect on past and possible future practice. How might educational developers best be guided while grappling with these questions that are both exciting and overwhelming (Timmermans & Meyer, 2017, p.1).

Each of these statements recognises both the potential of the theory alongside the current frustrations involved with translating liminal research into practice as well as further the purpose of transitory spaces as merely scholarly.

Such discourse discourages any forays into the intentional liminal design space, despite accounts of facilitating liminality present in other disciplines. In the field of education, Savin-Baden (2008) focused on 'learning spaces' and how these flexible, reflexive spaces allow knowledge to be contested. In organisational studies, Borg and Söderlund (2014) introduce the idea of the 'liminal competences' required by project

workers and consultants to work in fluid and transitory project environments. Tourism scholar, Chalip (2006) discusses how fostering a sense of celebration at the Olympic Games helps to create a meaningful and lasting sense of *communitas*. These statements and studies recognise the possibility of fostering organisational liminality conditions purposefully.

When examined together, the frustrations, barriers and accounts demonstrate the continued recognition of the potential of bridging the theory-practice gap. It also highlights the need to build on the effective practice-orientated frameworks of liminality in real-life transitional contexts. In this manner, scenario planning was identified as a contemporary strategic planning practice that already practices many of the known characteristics of liminality and facilitates transformational learning in an organisational context.

1.2.2 *Scenario Planning: Research Problem*

Scenario planning works directly with the inherent presence of business unpredictability about the future. The practice guides participants to draw upon a range of cognitive resources to build multiple visions of the future (Jackson, 1990). As with liminality, scenario development encourages the intentional fostering of transformative knowledge in a facilitated context (Bradfield, Wright, Burt, Cairns & van der Heijden, 2005; Kahane, 2012a). The process can feel chaotic to participants as they are asked to think outside their everyday thought processes (Hodgkinson & Healey, 2008). Moreover, the method “...*deliberately provokes* a high degree of turbulence within the participating group” (van der Heijden et al., 2002, p.188).⁹ Most relevant to this study, the success of a project is contingent upon engaged social

⁹ Researcher emphasis. Liminal spaces are inherently provocative although a facilitator does not always activate this state.

interaction between participants (van der Merwe et al., 2007) during “... a process that is designed to create time and space for a management team to share their ideas, hopes and concerns about the changing world” (Burt, MacKay, van der Heijden & Verheijdt, 2017, p.16).¹⁰

In this research, scenario planning is addressed as a social process that enhances decision making and causal connections of events to challenge conventional thinking (Wright, Bradfield, Cairns, 2013a). Although a social process, scenario planning falls within the field of organisational studies and itself adheres to this field’s norms, which complement and differ from the anthropological research norms (Romme, 2003). For example, organisational studies have a tendency to minimise or discount the importance of interpersonal skills and competences involved with creating a supportive learning and transitory environment (Schön, 1983). Long, Newton, Chapman, Dagleish, Foley and Langley (1997, p.1) articulate this as:

... the very process of collaboration is itself often taken for granted, especially when it occurs successfully. Alternately, when the collaboration is under stress or breaking down, the processes considered are often framed in terms of resistance, whether this be to the ‘outsiders’, to change, to management, to the organisational culture or to its environment.

This differs from the anthropological approach which considers, what can be learnt from how the various parties are comparting themselves and how this can inform

¹⁰ It is notable that David Whyte in Daloz Parks (2005, p.205) states: “The inherited language of the corporate workplace is far too small for us now. It has too little poetry, too little humanity, and too little good business sense for the world that lies before us... *Manager* is derived from the old Italian and French words *maneggio* and *manege*, meaning the training, handling and riding of a horse. ... images of domination ... and the taming of potentially wild energy. It also implies a basic unwillingness on the part of the people to be managed, a force to be corralled and reined in... most people don’t respond very passionately or very well to being ridden.”

the future.

Nevertheless, the lack of research surrounding the tacit psycho-social dynamics of scenario planning research made it necessary to explore the research outside of the scholarly attention typically focused on the validation of the method. Scenario planning has many inherently collaborative elements (McKiernan, 2017). Cognition and psycho-social factors inevitably arise when people are being challenged about the future (Scharmer, 2009). In summary, this recognises these factors, the potential and the gaps found in each field. It aims to explore a facilitated transformative practice with these existing parameters and consider how liminality is relevant in contemporary change contexts.

1.3 Research Questions and Aims

This research began with the broad aim of distilling and understanding the enablers of liminality in a facilitated context. The gaps and problems identified in the previous section narrowed this exploration to examine ‘...the clarification of practice-orientated liminal discourse informing intentionally created liminality in a facilitated context.’ The overarching exploratory research question is:

Question 1: *What are the psycho-social foundations of a practice-based framework for liminal spaces?*

This question led to four sub-questions which helped to guide the research process, the liminal literature was examined by:

Sub-question 1: *How does the liminal literature currently discuss the psycho-social design and facilitation of project spaces?*

The scenario planning literature was examined with:

Sub-question 2: *How does the scenario planning literature currently discuss the psycho-social design and facilitation of project spaces?*

‘Chapter three: Mapping the method and methodology’ was directed by:

Sub-question 3: *What is the best research approach to consider this foundational psycho-social practice-orientated liminal theory?*

The resulting findings from sub-question 1-3 necessitated a fourth question:

Sub-question 4: *Is scenario planning suitable to inform the practice-orientated design and facilitation of liminal spaces?*

The analysis of the consultancy data was driven by:

Sub-question 5: *What are the psycho-social foundations of a practice-based framework for liminal spaces?*

‘Chapter six: Intentionally designing liminality’ was directed by:

Sub-question 6: *What is the structure of a psycho-social transition in foresight and liminal spaces?*

Together these questions orientate the research to further an implementable discussion information both scenario planning and liminality.

The following steps were taken to define the foundations of a practice-based framework within liminal contexts:

- 1) Clarification about the practice orientation of liminality through the completion of a literature review.
- 2) Clarification of the psycho-social components of scenario planning through the completion of a literature review.
- 3) A presentation of the associations and distinctions between scenario development and liminality.

- 4) A preliminary confluence of these two literature reviews organised by the commonalities of the phase transitions identified in each of the fields.
- 5) The analysis of data collected from a scenario development consultancy (individual interviews, focus groups and participant observation in a scenario development workshop).
- 6) The development of a practice-orientated framework of liminality drawing on the findings from the literature in step 4 and the scenario development data from step 5. This new schema of practice-orientated liminality was considered from multiple-lenses, including participant cognition and facilitator role.

1.4 Scope of the Literature Review

The power of liminal and foresight spaces is that they encourage the surfacing of knowledge about the future that did not exist previously. In seeking to understand what can be learnt about establishing safe spaces to create new knowledge and strategy, this research examines the fields of liminality and scenario planning.

1.4.1 *Liminality*

Liminal transitions are significant because people face and transcend an unexplored territory - cognitively, emotionally or physically. During liminal times, participants feel unsteady, raw and vulnerable as they confront paradox, potentiality and social drama (Catron, Chiriboga & Krystal, 1980; Turner, 1969). Liminal spaces have been studied in a number of ways. For example, during Indigenous ritual (Schechner & Appel, 1991), critical life experiences (Powley & Piderit, 2008), religious pilgrimages (Turner & Turner 1978[2011]; LaFleur, 1979), revolutions and wars (Peterson, 2015; Wydra, 2015), and organisational change interventions (Wagner, Newell & Kay, 2012).

The liminal experience is a significant period of change where participants are compelled to reappraise their place in the world. Turner (1977, p.95) describes this as the “betwixt-and-between.” This phrase that is found throughout the liminal literature and has been variously interpreted depending on the context in which it is being applied (Meyer & Land, 2005; Myerhoff, 1975; Schechner & Appel, 1991; Thomassen, 2015). In all instances, people reach a “threshold” or “glass ceiling” and through necessity they are forced to consider the future in a new way (Balduk, 2008).

The longer an individual spends in a liminal phase, the deeper they move into an “ambiguous status” and one’s connection to their previous identity falls away. This feels disconcerting as the new identity is not yet clearly established (Lopez-Aguado, 2012, p.189). Such uncertainty is reported to provoke a range of emotions (Thomassen, 2009; Turner, 2012). In many instances, it is during creative or betwixt-and-between periods that people question, negotiate and re-construct their reality (Ladge, Clair & Greenburg, 2012). Such negotiation causes one’s established sense of self¹¹ to fluctuate between people feeling lost, or experience a genuine feeling of empowerment (Jackson, 1990; Rohr, 2004). The paradox is that the future feels both exciting and terrifying (Crocker, 1973; Cunha & Cabral-Cardoso, 2006; Yang, 2000).

Contemporary researchers identify symbols through observing rituals and interviewing participants. Anthropological research compares and contrast different symbolic understandings between various groups to demonstrate the way that cognitive reasoning and decision making takes place within different cultures (Van

¹¹ Locus of control, the idea that people’s expectations govern their actions (Lefcourt, 1981).

Buskirk & McGrath, 1999). To identify symbols, researchers study the individual and collective meanings being ascribed to events, stories or objects (Tyler, 2006). Examples of “symbolic artefacts” include imagery or branding (Loacker & Sullivan, 2016). When used wisely as a monitoring system, people can gain a deeper understanding of their position within any change processes being instigated (Schein, 1987).

Uncertainty allows researchers the opportunity to examine both the conscious (known and obvious) and subconscious (hidden and unclear) beliefs influencing participants (Jackson, 1990). Periods where people seek meaning are often rich in symbols to help people grapple with changes in place, state, consciousness, social position or age (Pentikäinen, 1979). Symbols will be present in structured or pre-established traditional rituals already established within the group norms and people know the signals (Turner, 1969). For example, during a Korean funeral the ritual of *saje-gori* a crown, song and knife symbolise the purification and passing of a dead man into paradise (Lee, 1991). These pre-established stories interact with emergent symbols that arise for the first time that if fostered, begin to move groups in the direction of a burgeoning future (Turner, 1969).

For organisational practitioners, symbolic language and emotions are useful tools to garner people’s attitude to the future. Symbolic language such as metaphor is commonly used in organisations to gain buy-in for a specific future scenario (Sapienza, 1987). The skilful use of symbolic language can help to minimise panic during disruptive organisational events (Hirsch & Andrews, 1983). For example, during the early phases of a scenario planning project, new data and ideas are being presented. At the time, no agreed collective agreement exists about how data is to be interpreted (Hurst, 1986). Each piece of new data will

contribute to how people interpret new information or ideas about the future.

1.4.2 *Scenario Planning*

Scenario planning is a business practice that creates similar conditions to the brief description of liminality provided above. A scenario planning project is a group-based relational strategic planning tool requiring a range of technical and social competences. Typically, top management within businesses are encouraged to consider the future using multiple lenses to move through a scaffolded learning framework with a sturdy process design (van der Heijden, Bradfield, Burt, Cairns, & Wright, 2002). A project will pass through a number of phases with the most creative being the foresight phase (Johnson, Prashantham, Floyd & Bourque, 2010).

A project is usually facilitated by external consultants who task members of an organisation with creating robust narratives (usually four) about how the different ways the future may unfold (Bradfield et al., 2005; van der Heijden et al., 2002). Information is considered from the past, present (emerging technology and trends) and the future (Mietzner & Reger, 2005; Vecchiato & Roveda, 2010; Wilkinson & Kupers, 2014). The resultant scenarios later inform a versatile strategic plan that is able to respond to different potential future results. Arriving at multiple scenarios is considered an integrative and iterative learning approach (Bodwell & Chermack, 2010).

The scenario process is regularly presented as a “cognitive device” (van der Heijden, 2011, p.51), that encourages proactive (rather than reactive) engagement with the future (Wack, 1985; 1983). The approach is popular with organisations wanting to engage with the future in a proactive way (Burt et al., 2017). Participants consider and re-order known and introduced data that informs organisational decision making (van der Heijden et al., 2002; Schwartz, 2009). A full scenario development project seeks to move an organisation from overwhelming uncertainty

towards an increased ability to perceive future potential gains through collaborative methods (Sarpong & Maclean, 2016; van der Heijden, 2005). Scenario projects aim to help strategic decision makers anticipate change, incorporate contingency plans into their long-term outlook as well as to build better strategies (Rohrbeck & Schwarz, 2013).

Open debate and strategic conversation are encouraged (Rattcliffe, 2002; Schwartz, 2009). These robust deliberations are important, so the future can be discussed outside the immediate pressure of decision making (van der Heijden, 2011). Scenario planning is a skill set that can take some practice to use competently (Wilson, 2000). The process does not come naturally to those who are more analytically inclined or have little or no regard for intuition (Hodgkinson & Clarke, 2007).

A successful scenario planning project relies on a range of different technical and psycho-social competences from facilitators. From the outset facilitators are building trusting relationships with key decision makers (Burt & van der Heijden, 2003). Their consulting role often involves educating participants about the purpose of using a non-traditional strategic planning method and building scenarios (Voros, 2003). Inevitably facilitators engineer a considerable amount of tumult by highlighting issues of uncertainty (Hodgkinson & Healey, 2008; van der Heijden et al., 2002). They then deliberately encourage open debate (strategic conversation) to enable insights about the future (van der Heijden et al., 2002).

The possible benefits of combining liminality and scenario development are considerable. From both an individual and group perspective, understanding how people successfully use symbols and stories to create strategy in facilitated spaces has the potential to stimulate creative ways of work (Lindsay, 2010; Sturdy, Schwarz

& Spicer, 2006; Thomassen, 2009); as well as to develop novel solutions and fresh approaches to established problems (Camillus, 2008).

1.5 Additional Term Definition

This section defines some of the sociological, anthropological and psychological loan-terms and theory used in this research. These terms have been drawn upon to enhancing the overall study.

1.5.1 *Cognition*

The term ‘cognition’ refers to the different styles and manners in which people interact with information, and process this to create action (Kozhevnikov, 2007). This encompasses future-orientated thinking which encapsulates a strategic focus on the creation of knowledge that did not exist previously. Both liminal and scenario planning research studies the cognitive mechanics where a shift in understanding is occurring.

1.5.2 *Future-Orientated Knowledge*

The term ‘knowledge’ has different meanings depending on the discipline. Both liminal and foresight spaces draw on multiple knowledge types and accept emergent thinking, while also being able to operate within context and history (Chan Kim & Mauborgne, 2015; Nonaka & Konno, 1998; Scharmer, 2009). This research adopts the term ‘future-orientated knowledge’ to signify knowledge created in liminal space. Future-orientated knowledge is different from mainstream knowledge (see below) and is articulated in a new way with practical implications. Future-orientated knowledge is relevant as it can be translated from insight to action (Burt et al., 2017; Rohrbeck & Schwarz, 2013).

Table 1: *Dimensions of Knowledge* distinguishes some of the ways knowledge is understood.

Table 1: DIMENSIONS OF KNOWLEDGE

Authors / Theory ¹²	Knowledge Typologies	Description
Inayatullah (1990)	Predictive-Empirical	<ul style="list-style-type: none"> ➤ Instrumental <ul style="list-style-type: none"> • Rationalist modes of prediction • Based on the empirical natural science model • Aims to develop more accurate forecasts of the future • Quantified and domesticated • Assumption that the current status quo will remain ➤ Presupposition of change <ul style="list-style-type: none"> • Reconfiguration of power relations • A universal perspective (e.g. truth is different in China, India or Australia) • Symmetrical dialogue • Assumptions are one's cultural lenses ➤ Post-Structuralist¹³ <ul style="list-style-type: none"> • Making the present remarkable (norms are not transferable across time or context) • This concept is difficult for organisations to with and language is theoretical
	Cultural	
	Critical	
Mason (1994, p.11)	Risk-Reduction	<ul style="list-style-type: none"> ➤ Accepted contemporary practice <ul style="list-style-type: none"> • Aims to catalyse debate • Useful to find weak approaches to a global environment • Responds to the future as it evolves • Ticking boxes • Limited substance ➤ An organisational intention to change accepted contemporary practice <ul style="list-style-type: none"> • Aims to maximise latent potential • Focuses on a vision of an alternate future • Challenges organisational capacity
	Transformative	
Scharmer (2009)	K1 – Explicit Knowledge	<ul style="list-style-type: none"> ➤ Independent of context <ul style="list-style-type: none"> • Mainstream knowledge • Linear ➤ Tacit Embodied Knowledge <ul style="list-style-type: none"> • A mixture of emergent and mainstream knowledge • “Emerging Mainstream” • Non-linear
	K2 – Situated in Context	
	K3 – Not yet embodied	<ul style="list-style-type: none"> ➤ Blind spot <ul style="list-style-type: none"> • Sources of knowledge • Sources of emergence

Source: Author Compilation

¹² Listed in alphabetical order.

¹³ Post-structuralism is a theoretical approach that examines literary works and societal norms in order to deconstruct the premises on which they are formed. The underlying claim is that texts and reality can only be understood in relation to other norms, therefore, there is no “ultimate truth” (Abercrombie et al., 2006, p.303).

Table 1 demonstrates that there are multiple positions about knowledge and highlights some of the complexities in how future studies are approached.¹⁴ All the theorists presented in the table identify a first layer of mainstream, explicit mechanistic information that is already accepted and does not require active engagement by learners. Liminal spaces are those which work with the second and third knowledge typologies that questions and creates new knowledge.

Emergent knowledge uses established and new ideas simultaneously to influence decision-making (Scharmer, 2009). Nonaka and Takeuchi (1995) describe emergent knowledge as a "...situational living process that evolves in a spiraling movement between explicit and tacit dimensions of knowledge held by individuals, teams, and the organization" (pp.72-73). In this description knowledge expands existing ways of thinking and contributes to a field or an organisation and the accepted underlying premises, or key aspects of an organisation continue to be accepted (Ichijo & Nonaka, 2007). Many scenario planning projects take place in the emergent knowledge space and the resultant strategy is not ambitious or outside an organisation's typical strategic direction (Burt & van der Heijden, 2003; Chermack, 2011; Chermack & Swanson, 2008; Mason, 1994; Upham, Carney & Klapper, 2014).

Scharmer (2009) introduces a third category of knowledge that is not yet defined, yet still undergoing formation. This knowledge type is difficult to articulate as it is actively moving the "...boundaries of human existence" into "...uncharted territory" (Scharmer, 2009, p.107). This type of knowledge is new, edgy, and outside accepted mainstream knowledge. There are similarities to Wack's (1985, p.73) idea of

¹⁴ 'Scenario planning' and 'futures studies' are not interchangeable, and a grey area exists between the two. Often futures theorists do not strictly follow scenario planning methodology (section 2.7). Their focus is on the future and they develop specific tools and techniques in this capacity.

“unchartered waters” where people practice building their ability to think, apply and purposefully create future-orientated knowledge (Borg & Söderlund, 2014; Chan Kim & Mauborgne, 2015; Wilson, 2000).¹⁵

Scharmer’s theory of co-creative knowledge has similarities to Bhabha’s (1990) conception of “third space” or the Yolngu concept of *Ganma* where two or more “cultures” or “knowledges” are engulfed by each other in the “...(re)creation of knowledge” (Laycock, Walker, Harrison & Brands, 2011). In these examples, new knowledge is not intentionally sought as with Scharmer’s conception. Indeed, through unintended cultural interaction, each culture finds it difficult to strictly maintain their ‘authentic’ way of knowing without acknowledging the needs of a ‘new’ culture of the future.¹⁶

1.5.3 *Holistic Skills*

Holistic skills are defined as a range of task-focused and tacit skills, which are employed according to the needs of the context or environment (Harvey et al., 2002; Kitson, Harvey & McCormack, 1998). The term has many similarities to ‘tacit’ or ‘soft’ skills and recognises the need for a subjective element of competence in planning and flexibility during uncertain, complex and unique situations (Schön, 1995). Senge, Scharmer, Jaworski & Flowers (2004, p.2) articulate this as:

The changes in which we will be called upon to participate in the future will be both deeply personal and inherently systemic. The deeper dimensions of transformational change represent a largely unexplored territory both in

¹⁵ “Water, like knowledge, has memory. When two different waters meet to create Ganma, they diffuse into each other, but they do not forget who they are, or where they came from” (Pyrch & Castillo, 2001, p.380).

¹⁶ Examples of the third space include the influence immigrant culture’s home cuisine have had on their host country’s identity. E.g. Chinatown being a drawcard in London (Moufakkir, 2017). Or a Western and Aboriginal cultural mindset needing to work together to achieve healthcare outcome to meet the needs of Aboriginal Australians (Marriott et al., 2019).

current management research and in our understanding of leadership in general... This blind spot concerns not the what and how – not what leaders do and how they do it – but the who: who we are and the inner place or source from which we operate, both individually and collectively.

1.5.4 *Holding*

The term ‘holding’ originates from work by a psychologist Winnicott (1965; 1953) in his research about an infant’s reliance on a mother-figure and the importance of strong boundaries to enable the baby’s maturity through playing with different identities. Winnicott views that the presence or absence of the mother (boundary) is essential for an individual to develop their own identity and function in the world. Infants only require a “good-enough” sense of support, which allows them to explore the boundaries of their own agency (Winnicott, 1965).

Since Winnicott’s research, the holding environment has arisen in other disciplines describing the development of self-reliance and skill development (Davis & Wallbridge, 1991). In the workplace, rather than the mother-figure, trusting relationships with colleagues are the holding environments that encourage interpersonal risk-taking and facilitate exploration (Edmondson, 2003; Rudwick, 1996). During workshops a facilitator embodies this role and allows leaders to ‘be held’ in order to question organisational boundaries and everyday norms (Cohen, 1985; Meyer & Land, 2005). The concept of *holding* is expanded further in ‘chapter six, section 6.3.3.1: holding space’ and addresses the intentional harnessing and pause that can increase the psychological safety of the facilitation space (Miller, 1995).

1.5.5 *Organisational Culture*

An organisation's culture is made up of a myriad of conscious and unconscious beliefs, practices and ways of doing business. Hofstede (1994, p.1) defines organisational culture as "the collective programming of the mind which distinguishes the members of one group or category of people from another." Organisational culture is made up of many interrelated parts and is not stagnant. Despite consistent symbols or norms, organisational cultural changes and different individuals will understand their culture differently.

1.5.6 *Psycho-social*

This research focuses on the psycho-social inflections occurring within scenario planning. Psycho-social components include the expression and capacity for social, emotional and intellectual functioning within a given context (Hamachek, 1988). Psycho-social capacity is one's ability to communicate and interact in social environments with a healthy degree of psychological wellbeing (Rosenthal, Guernsey & Moore, 1981). Components of psycho-social wellbeing include healthy demonstrations of trust, intimacy and communication. Within business contexts psycho-social wellbeing is one's ability to operate within the parameters and expectations of an organisation and being able to maintain an independent and unique expertise.

1.6 Methodology, Epistemology Research Approach

A concept analysis method and techniques were used for this research project. This approach is relevant to determining if liminality is translatable from theory into practice because it is more interpretative, than staged. Instead, a research process of inquiry establishes the developmental stage or maturity of a concept "...as revealed

by their internal structure, use, representativeness, and/ or relations to other concepts” (Morse, Hupcey, Mitcham & Lenz, 1996, p.255). The distinction between the conceptual analysis method chosen and other positivist approaches is that it aims to understand the active process of sensemaking in real time (Easterby-Smith, Thorpe & Jackson, 2015).

The research occurred alongside a consultancy for a scenario-informed strategic planning project, hereafter referred to as ‘project A’ or ‘the consultancy.’ This research, ‘project B’ asked a different set of research questions. Both project A and project B analysed the individual interviews, focus group and Delphi survey data. Post-hoc studies are common in scenario planning research to gain a deeper understanding of current thinking and evolution of practice (Ratcliffe, 2002). Project B also examined field notes taken in the scenario development workshop and such ethnographic research has long been established in liminal research (Bargiela-Chappini, 2007).

The concept analysis approach was chosen for a number of reasons. It was consistent with liminal and scenario planning research approaches. Ethnographic tools like participant-observation are commonly used to gather data during transitory events (Burns, 2012), with researcher reflections increasingly playing a key role (Turnbull, 1991). The concept analysis approach is most suitable for exploratory studies where the focus of the study has not been comprehensively investigated (Walsham, 1995). Finally, it aligned with the qualitative project design from the case study and scenario-informed strategic planning project. Using a quantitative method within project B would be a significant change from the initial approach adopted for project A.

1.7 Study Structure

This study is structured to distil the liminal literature and examine if scenario planning can inform a practice-orientated liminal framework. The research drew on literature and data from a scenario planning project to close the gap between liminal theory and liminal practice. To achieve this, attention was placed on both the psycho-social experiences of participants and the role of facilitator's in supporting a transitional experience

'Chapter Two: The liminal and scenario planning waters' presents the historical and contextual development of liminal theory. The origins of the theory and the contemporary application in organisational contexts is presented. The structure of the different phases of liminality (separation, liminality and re-integration) is provided. Chapter two identifies and delineates the diverse nature of liminal research and emphasises the necessity of clarifying context and demonstrates a gap between liminal theory and liminal practice. The second part of chapter two introduces scenario planning as a practice with the potential to understand the design and facilitation of liminality. Scenario planning is a practice that guides participants to think about the future in a new way, has a similar transitory structure. Demonstrations of liminal characteristics are present in scenario planning reports, particularly during the foresight phase.

'Chapter three: Mapping the method and methodology' presents the approach used in the study. The interpretative approach used throughout the study to examine the literature is described. The methods of data collection, research process, methodological choices and barriers encountered in this exploratory research are outlined.

‘Chapter four: ‘Uncharted waters’: Scenarios as liminal space’ presents an early confluence of the liminal and scenario planning literature. The characteristics, existing frameworks, research approaches and practice from both areas are examined. The conclusion of the chapter argues that there is precedence for a theory of purposeful engagement with liminal forces (emergent and pre-existing). From these foundations, the subsequent analysis of study data and identifies the preliminary parameters of designed liminality.

‘Chapter five: The heart of corporate memory’ presents the research data drawn from the scenario planning consultancy. The focus groups, individual participant interviews and Delphi survey data help to demonstrate the pre-existing organisational conditions which contribute significantly to the emergence of liminality within an organisation. The second part of the chapter presents selected ethnographic field notes to identify some of the emergent psycho-social dynamics and potential enablers of liminality during the scenario development workshop. This data highlights the importance of leadership competence to allow a project to evolve. The data also demonstrates a pre-existing capacity in the organisation that encouraged discussions about the organisation’s risks and gains from a psychodynamic and business perspective.

‘Chapter six: Intentionally designing liminality’ provides a synthesis of the earlier chapters and with a framework of designed liminality. The ordering components of the design and facilitation of liminality are emphasised from both a liminal and scenario position. This framework first focuses on the cognitive phase transitions experienced by participants as they develop a range of scenarios. The role a facilitator takes will shift in relation to the cognitive needs of participants. As such, the same framework addresses the phase inflections for facilitators (non-liminars). The specific demands

on facilitators during each transition phase are highlighted. This moves into a discussion of the varying levels of engagement that a participant can carry into a project.

‘Chapter seven: Conclusions and future research’ offers a conclusion and highlights key contributions emerging from this study for theory and practice. Key recommendations about the future of the designed liminality concept and creating future-orientated knowledge are briefly touched upon. The methodological limitations that arose during this study are also presented in this chapter. It is hoped that future research will account for these limitations and that future studies examining these two practices together will continue to build theory for facilitators and the purposeful creation of knowledge.

In full, this study is an exploration of a purposeful liminal framework and contributes to the design and solidification of new knowledge. It is hoped that future research moves in the direction of developing a robust understanding of the facilitation tools and support needed for the specific inflections occurring in liminal spaces.

1.8 Chapter Summary

This chapter introduced the reader to the research which explores the intentional creation and subsequent influence of liminal characteristics within facilitated spaces. The research problem and methodological approach, research aims, and research questions were outlined. The significance and contribution of the research introduced the reader to the direction of the study. The underlying premise of this exploratory research is that an applied liminality concept can inform the design and facilitation of intentional transitions in organisational boundaries. Chapter two begins to examine the literature considered for this research.

Chapter 2: The Liminal and Scenario Planning Waters

The evolution and development of liminal and scenario planning literature is presented in this chapter. The chapter is structured as follows: the first part undertakes an examination of the liminal literature relevant to bridging the gap between a theoretical and practical liminal agenda. The research sub-question: *'How does the liminal literature currently discuss the psycho-social design and facilitation of project spaces?'* focuses on the deliberate engagement with liminal space. The review addresses this research question by introducing the historical use and origins of liminality, including organisational liminality. The structure of a three-tiered liminal process is described.

This leads to a delineation of the profiles of liminality by how the phase of separation occurs. This section contributes in a number of ways, first it distinguishes the different approaches to liminality. This demonstrates that the term liminality must be understood in context (e.g. liminal space may be catalysed through crisis, ceremony or design), or within the disciplinary boundaries that the research is being undertaken. The distinct nuances in different disciplines create differing research questions about liminal space. The conclusion of the liminal review found that any discussion about designing psycho-social liminal spaces is largely absent. Although there are potential areas that inform the emerging discussion, for example, organisational liminality studies have begun documenting the importance of clear communication and parameters, contemporary ceremonial liminality, argue that excitement can be fostered and harnessed, with impacts extending well past the event itself. Traditional ceremonial liminality remains a mainstay of any liminal theory, especially in the emphasis on the importance of

symbols and stories as tools to communicate the objectives of change, in any liminal context. The liminal review concludes by presenting the gaps and opportunities within the liminal research for further investigation.

The second part of the chapter examines scholarship pertinent to the research sub-question: *How does the scenario planning literature currently discuss the psycho-social design and facilitation of project spaces?* The response to this sub-question first provides a historical overview of the theory which began as a military tool in the 1940s (Rohrbeck, Battistella & Huizingh, 2015). The literature indicates that scenario planning interventions are ideally scaffolded through a set of methodological phases. This is laid out in a systematic way that aims to challenge people's thinking. Nevertheless, there are gaps and opportunities in the discussions taking place in the scenario planning space that are highlighted at the end of this chapter.

2.1 The History of Liminal Theory

Liminal theory originated in the field of anthropology and was used to examine small-scale communities in the early 1900s. Belgian anthropologist Arnold van Gennep (1909[1960]) first introduced liminality in his text *Les Rites De Passage* where he described liminality as "...the basis of characteristic patterns in the order of ceremonies" (van Gennep, 1909[1960], p.10). His seminal work continues to influence theory today, although during his lifetime liminality was not widely known (Thomassen, 2009).

After van Gennep's death in 1957, anthropologist Victor Turner applied the liminal theory to his fieldwork with the Ndembu group in Zambia (Turner, 1969; 1977). Turner emphasised that change was driven by micro and macro influences.

This was a ground-breaking claim within the social sciences as at the time scholars tended to either place an emphasis on change being a result of societal influences or individual agency (Babcock, 1984). Turner's early anthropological work set a precedence for liminality detailing the precise details and machinations of rituals, focusing on how people were guided into altered states of consciousness through the use of symbols (Thomassen, 2009; Myerhoff, 1991). A practice that many theorists have continued into the current day (Schechner & Appel, 1991). Turner went on to apply liminality in many different contexts. The disciplines he studied include theatre (Turner, 1982), sociology (Turner, 1979a), with a focus on pilgrimage towards the end of his life (Turner & Turner, 1978[2011]).¹⁷

Other prominent liminal branches have arisen since Turner's adoption of the theory. Meyer and Land (2012; 2005; 2003) champion the concept of threshold knowledge in the field of education and focus on student's entering new disciplinary communities (Gibbons, 1974; Land Meyer & Flanagan, 2016; Rattray, 2016). Threshold knowledge focuses on students learning new foundational knowledge and entering a "conceptual gateway" or "portal" where they are asked to engage with knowledge in a different way (with particular focus on the shift from learning at high school to learning at university) (Land, Meyer & Smith, 2008). Threshold knowledge discussions are developing further every year, although this field does not currently focus on new future-orientated knowledge or innovative knowledge creation (Meyer & Land, 2005). Many publications emerging from this body of work are relevant to the current study. The most significant is the emphasis

¹⁷ Babcock (1984, p.461) articulates: "It will take many more lifetimes to trace out the multifarious and interconnecting ramifications of the stupendous interdisciplinary web of ideas..."

on the holding environment and the iterative process of learning (Land et al., 2016).

Political studies consider liminal theory amidst the formative, historical and untenable influences on the societal expression of various countries and states (Dobry, 2015). Horvath, Thomassen and Wydra (2015) argue that our collective ability to grapple with theoretical complexity enables a more accurate examination of the 'irrational' realities now present in our political structures (Horvath et al., 2015). The relevance to this research is how salient uncertainties of our modern experiences can be "bounded and channelled" (Wydra, 2015, p.183).

Sociology follows many of the premises found within the anthropological branch of liminality. Sociologists view liminal phases as serving a function within society. Different norms and aspects of a society persist, and uncertainty allows people to 'release' their tension that arises when one is simply caught in existing, rather than creating (Wydra, Thomassen & Horvath, 2015). The sociological field is distinct from the anthropological one in that attention is placed on larger societal changes and domains of power, rather than small mystical rituals (Szokolczai, 2015; Thomassen, 2015). Thomassen's (2014, p.7) words demonstrate the view of sociology in that:

Liminality explains nothing. Liminality is. It happens. It takes place. And human beings react to liminal experiences in different ways. Those ways cannot be easily predicted. But they can be analysed and compared, and at the formal level they share important properties.

In essence, liminal research can prove valuable to understanding the cultures that form our society and understanding how individuals choose to operate within these norms (Meyer & Land, 2005).

The next section of this review examines the processual phases of liminality to provide an understanding of this backdrop.

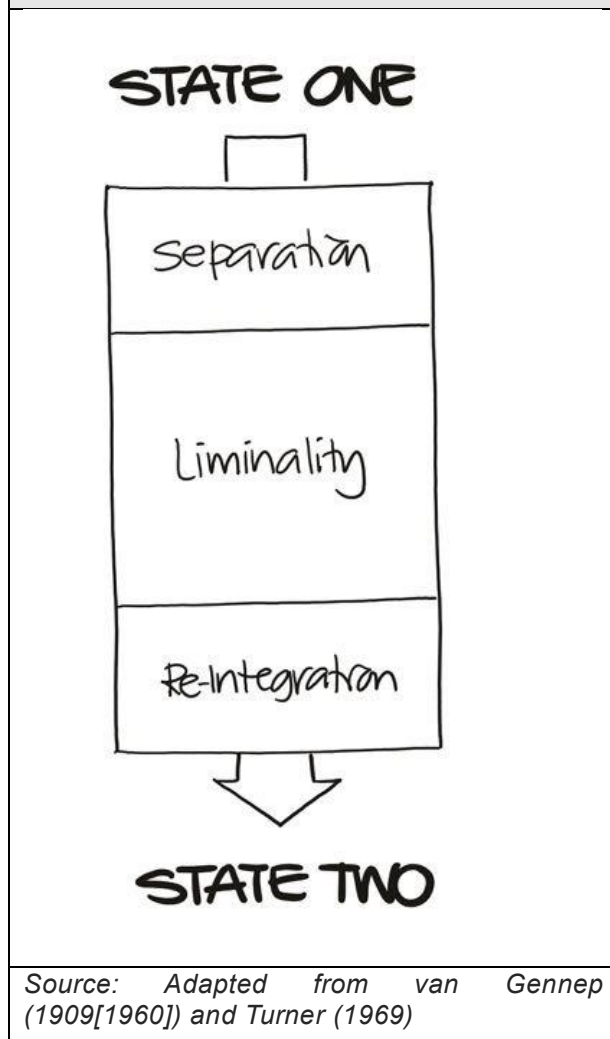
2.2 The Phases of Liminal Transition

A full liminal transition is discussed in three phases: 1) separation; 2) liminality; and, 3) reintegration (van Gennep, 1909[1960]). This basic three-phased structure is known as a “rite of passage” whereby people move through a ‘ritual form’ consisting of changing states of consciousness (Thomassen, 2009, p.9).

A full transitory process separates people from a ‘normal’ cognitive state into an altered state which ends with a ‘return’ phase. Any insights gathered in the middle phase begin to be implemented as a participant or group looks into the future (Teodorescu & Călin, 2015; Turner, 1977). Each phase can be mapped by distinct textures¹⁸ and symbolic patterns (Miller & Friesen, 1980). In practice, the distinct phase transitions are not always clearly delineated and can be fluid (Simpson, Sturges & Weight, 2009).

¹⁸ The term texture is used quite specifically to indicate the subtle nuances in the internal experiences of participants. Subtle textures will distinguish the instances where people feel trust and offer their expertise and wisdom, and one where people do not. These signals are not always explicit.

Figure 1: A LIMINAL PHASE TRANSITION



Researchers differentiate the phases by examining people's symbolic behaviour (Erikson-Zetterquist, 2002). Examples include: changes in language, tone, diet, ritual theatre, manipulation of time, or a consultant coming into the organisation (Bell, 2003; Borg, 2014; Czarniawska & Mazza, 2003; Obeyesekere, 1991).

The potency of a three-phase framework of change is found other disciplines, such as psychology and change management.¹⁹ One example is Lewin's three-phased change

model. This model includes: 1) creating an awareness that change needs to occur by unfreezing structural norms or separation. 2) Entry into a new change or liminal space; – and 3) embedding new behaviours and beliefs as the norm (Lewin, Long & Carroll, 1999). An in-depth comparison is beyond the scope of the current project and has not been undertaken previously, although others have noted the similarities (Bradbury & Lichtenstein, 2000; Howard-Grenville, Golden-Biddle, Irwin & Mao, 2011; Powley, 2004).

¹⁹ Future research may benefit from furthering the synchronistic and valuable ways tripartite frameworks of change inform each other.

The following phases can be experienced by an individual or a group. In both instances people enter a process of change aiming to seek something that was previously unknown to them.

2.2.1 Separation

The separation phase is a departure from the norm. Separation in various ways and people may have lots of notice and be prepared or be suddenly triggered. Formalised transitions include established separation rites that are integrated into a culture through customs and taboos (Kralik et al., 2006). Separation rites subtly communicate that a change process is imminent and that it is time for a physical or psychological change into a new phase of proximal development²⁰ (Gaggioli, Milani & Mazzoni, 2011).

In a business group context, an example of a pre-liminal rite is the use of icebreakers or setting group rules (Atkinson & Robson, 2012). Other separation signals include, external consultants entering an organisation, signalling that a change process is intended (Czarniawska & Mazza, 2003; Wagner et al., 2012). Depending on the way consulting projects are communicated, employees may feel caught off guard. 'Section 2.4, table 3: Liminal domains across the research spectrum' expands on some variations of separation.

2.2.2 Liminality

The central liminal phase is best described in contrast to typical day-to-day experiences (Atkinson & Robson, 2012). During the liminal period, people are questioning the norm. Such questioning helps shift a group from traditional

²⁰ The zone of proximal development is the difference between what a person is capable of with help, when compared to what is possible without help (Vygotsky, 1978).

structure and formalities and draws on new tools to formulate a new understanding of the future (Turner, 1969). Providing this ability for people to question their beliefs safely²¹ means these do not unconsciously impinge on everyday activity (Feldman, 1990). Thus, enabling people "...to develop a freer, deeper understanding of the system from which he/she has been removed" (Myerhoff, 1982, p.117).

A common occurrence during liminality is that the typical roles tends to narrow. The stripping of daily routine enables a new set of temporary parameters that encourages people to act outside their 'typical' character (Dobry, 2015; Johnson et al., 2010). Regardless of their status, people connect and discuss their views with others (Turner, 1969, p.133). In a work context, people have an internalised dialogue and experiment and reflect on the potential selves (Beech, 2011). Indeed, people are not floating aimlessly and continue making independent choices and calculations about their level of engagement (Dobry, 2015).

The longer someone spends in this phase the more ambiguity and paradox become magnified (Ibarra, 2007). It is at the central liminal point where reality can go in different directions, with little certainty a full transition will occur (Rutherford & Pickup, 2015). People react differently to the temporary state. Some people flourish when they sense that reality and the future is malleable (Turner, 1979a; Winkler & Mahmood, 2015). Whereas other people find being challenged causes some anxiety (Catron et al., 1980; Turner, 1977). Regardless of whether people enjoy or resist the

²¹ 'Safety' and 'psychological safety' is mentioned throughout this literature review. The term's significance is not expanded in depth until Chapter six. Neither the liminal or scenario planning literature has greatly considered safety and future-orientated knowledge. Researchers in cognitive load and cognitive flexibility demonstrate that asking people to create new and sustainable knowledge can feel unwieldy and they are likely to engage at a higher level when they feel their ideas will be accepted in their raw state (Delizonna, 2017; Scharmer, 2009).

space, new ideas are able to be solidified and later become implemented while new qualities become integrated (Wicks & Reason, 2009).

One term in liminality that can be misunderstood is the term ‘anti-structure.’ Anti-structure means people are removing themselves from everyday activity to open up different thoughts, distinct from typical deliberations (Johnson et al., 2010). Despite the tone of the word, in liminal usage anti-structure does not signify anarchy, but instead represents people engaging with previously unrealised possibilities.

2.2.2.1 *Liminality in Groups*

‘Communitas’ is a sense of temporary camaraderie and flow inspires people to solidify change during group transitions. Communitas describes a heightened experience of creativity and wonder, which helps foster collaboration (Csikszentmihalyi, 1996; Rohr, 2002). Communitas is likely to occur just before a liminal phase moves into a steady state (re-integration), where a spontaneous social bond is observable. People feel a sense of connection and understanding specific to the experience in the moment (Turner, 1969, p.133).^{22,23} Liminal insights become more solid and less abstract or uncertain and a group is able to articulate a fairly consistent vision and strategy for the future (Czarniawska & Mazza, 2003; Garsten, 1999; McWhinney & Markos, 2003; Sturdy et al., 2006).

Understandings of communitas overlap with the concept of flow (Nonaka, Toyama & Hirata, 2008). Both the founder of the flow concept, Mihaly

²² Communitas is a distinct relational concept that is distinguished from the concept of ‘community’ because it is a temporary experience rather than building an ongoing relational capacity (Beavitt, 2012).

²³ When no one individual is “...in control and not the center, something genuinely new can happen” (Rohr, 2002).

Csikszentmihalyi, and Turner acknowledged the influence and the similarities between each concept (Csikszentmihalyi, 1975; 2008[1991]). This is widely accepted and the terms *communitas* and *group flow* are considered interchangeably (Kotler & Wheal, 2017).

For Turner (1977, p.48), the difference between the two lies in the role of competition during *communitas*. This work follows the work of scholars who consider conflict and competition inevitable in liminal spaces, amidst increased solidarity (Cohen, 1985). This is consistent with liminal accounts in Western and Indigenous rituals (Cohen, 1985). Conflict will be less likely once a healthy stabilised environment is present.

Communitas is intense and ultimately people begin to tire of the experience of creation and begin to seek the stability of the next state (re-integration) (Turner, 1977). People join together to create a new path out of uncertainty (Garsten, 1999). Positive memories of *communitas* can be helpful to action moves towards a new vision of the future (Beavitt, 2012; Howard-Grenville et al., 2011).

2.2.3 *Re-integration*

The re-integration phase constitutes a reassertion of everyday responsibilities and re-establishment of roles (Turner, 1977).²⁴ The potency and new vision created during liminal experiences provide the groundwork for change as well as the foundations for later implementation phases. Following the completion of a successful transitory project, groups usually retain the memory of camaraderie that working together at high levels of engagement brings (Cohen, 1985; Kotler &

²⁴ Other terms for this phase are “rites of aggregation”, “re-incorporation” or “return” (Borg 2014; Bell, 2003).

Wheal, 2017). Any memory of liminal characteristics has important implications for the future.

Sometimes integration is not well supported, the experience is extremely disillusioning and isolating. Scholars view poor support is most common in Western society with individuals left to process significant cognitive shifts on their own (Bell; 2003; Catron et al., 1980; Lewis, 2008). Carson (2016) uses the example of military veterans returning from war “but perish[ing] in epidemic numbers and in ways unrelated to battle” (p.xii). Because of the lack of support, people are increasingly interested in understanding the significance of liminal characteristics, practicalities and presence during significant challenges (Scharmer, 2009; Senge et al., 2004).

Ultimately, the precise liminal termination point cannot always be determined. Different contexts necessitate different transitions and this phase manifests in different forms (Thomassen, 2009; Turner, 1977). A full transition is considered successful when people are recognised as having achieved change by others (Beech, 2011).

Each person is impacted differently by the experience (Rattray, 2016; Thomassen, 2014). Some people are unable to achieve any fundamental changes, and can remain feeling stuck or lost (Wydra, 2015). Others continue receiving insights long after a rite of passage has finished (Simpson et al., 2009; Szakolczai, 2009). The successful completion of a liminal transition requires an individual and their environment converges to fuel the next phase of their life (or business) (Carson, 2016).

Beyond the reintegration phase, any liminal experience remains significant. Memories from this time will likely impact individuals beyond the process itself (Chalip,

2006; Moore & Myerhoff, 1975). The insights originating from liminal space have implications beyond the close of a transition and continue to influence later actions.

2.2.4 *Presenting the Liminoid*

The liminoid is a subset of liminal theory where people need to change, yet feel completely untethered or unable to exit the chaotic liminal state (Turner, 1977; 1982). The liminoid is a space where transition is being demanded but the environment is unable to sustain or support any insights people may have. For example, Atkinson and Robson (2012) examined two school-based arts programs and found that intrusions from the “outside world” are likely in contemporary liminal environments, making separation difficult for facilitators. Similar challenges have been cited in scenario development accounts (Johnson et al., 2010; Rohrbeck & Schwarz, 2013).

Victor Turner viewed all contemporary society as overly individualistic and lacking community-orientated goals. For Turner (1987), important aspects of liminality: creativity, ceremony and ritual is not validated and awkward in Western culture (Beavitt, 2012; St John, 2001; Thomassen, 2015). The liminoid is assumed to be a superficial state and symptom of our modern-day avoidance of taking risks (Varley, 2011). Others describe this as a mechanical pursuit of synthetic community, rather than a naturally arising symbolic flow (Lett, 1983). The key premise is that liminal aspects of innovative transitions are not present and the liminoid culture is slow to adapt, change.²⁵ In essence, the societal support for creativity is not present.

Social scientists are the most likely discipline to distinguish between the liminal and liminoid. Examples include a youth’s coming of age consisting of

²⁵ More depth regarding the parameters of ‘choice’ and transition is found in Turner (1982).

drinking alcohol, rather than ceremonial initiation with elders (Northcote, 2006). Lewis (2008) highlights that people are still seeking these rituals and take substances that influence consciousness in foreign countries but return to their own countries where others cannot grasp what they have experienced. In his study of a rite of passage school camp Bell (2003) had similar findings. Bell claimed that even though a group of boys were encouraged to act as young men throughout the camp, their parents had not been told what the camp was about. As a result, many parents continued to treat their sons as children which impeded their ability to change. In each instance, the lack of environmental change to support a youth's growth meant the young men reverted to their role as boys and were unable to complete the phase of re-integration.

The line established by Turner between the liminal and the liminoid has meant the liminoid has largely been ignored by organisational theorists. It is argued that the liminoid concept is useful to discuss the scale of readiness for organisations embarking the pursuit of new directions. This proposition is furthered in 'section 6.5: Groups in liminoid space.'

2.3 Researching Organisational Liminality

Organisational liminality is still defining itself as a discipline and falls between organisational studies and the social sciences. Organisational studies and the social sciences are the most common fields that this study draws on, an adaption of Romme's (2003, p.559) "framework for engaging in organizational research"²⁶ is

²⁶ These are not incompatible as action and "theory" are inherently related with theory regularly validating action and vice-versa (Gramsci, 1971).

presented below which describes the differences in each approach. The differences are largely found in the epistemological approach.

Table 2: DIVERGENCES IN TYPICAL RESEARCH AGENDAS		
	Organisational Studies	Social Sciences (Liminality)
Research purpose	Organisational science approach: Aims to understand organisational phenomenon by uncovering generalisable patterns and methods that explain optimal outcomes.	Humanities approach: Aims to "... understand and critically reflect on the human experience of actors inside organized practices" (Romme, 2003, p.559).
Focus of theory continuation	The search for generalisable causal propositions, method, replicable phenomenon.	The search for universal macro and micro rules. Often examined through a contextual analysis of power relationships.
How knowledge is situated	Representational: Knowledge already indicates the rules of the world. Descriptive and analytical.	Constructivist and narrative: Knowledge is constructed from human interaction, thought, speech and reflection. Reflective and critical.

Source: Adapted from Romme (2003, p.559).

Table 2 demonstrates the differences between the research agendas. Each asks different questions, which influences the way research is approached. Column one, highlights how organisational studies focus on describing generalisable patterns that can be replicated in multiple contexts (e.g. Ratcliffe, 2002).²⁷ Whereas, column two shows that social science research seeks to find contextual relational and universal rules. Often applying a critical lens towards any dominant cultural discourse and norms influencing people's behaviour (Romme, 2003).

This is where organisational liminality has difficulty finding footing. Liminality is a unique period of time where every day norms and behaviour are being questioned. Moreover, critiquing norms (social sciences) or describing everyday patterns

²⁷ For further clarification Inayatullah (1990) describes various epistemological premises embedded into future studies. Such critical analysis is rare within the scenario planning literature and scattered amongst the "futures" publications.

(organisational studies) are not relevant when people are actively and rapidly constructing new realities and seek meaning (Turner, 1969; Jackson, 1990). Instead, organisational liminality examines the navigation of uncertainty and the marginal spaces in which people find themselves.

Liminal critiques demonstrate some apprehension that liminality is not translational to business practice. There is little precedence of organisations articulating a full knowledge creation process from separation through to implementation phase (Collins, 2005). With indications that it is difficult to embed liminal practices into businesses (Czarniawska & Mazza, 2003; Garsten, 1999).

Organisational practitioners' have been laying foundations to operationalising liminality in group contexts. For example, Johnson and colleagues (2010) demonstrate that a well-defined and purposeful objective helps the success of these spaces. Antonovsky (1993) showed that the success of creating new knowledge relies upon legitimate and clear information being presented to participants. Söderlund and Borg (2018)²⁸ view that organisational liminality can be best understood in three sub-categories: 1) process; 2) position; and, 3) place. Each of these sub-categories has individual and collective implications.

Collective liminality occurs when a new organisational direction is being sought. In these contexts, conversations occur questioning inefficient processes or stringent business rules (Cunha, Guimarães-Costa, Rego & Clegg, 2010). Collective liminality projects are generally learning zones where people's ideas are challenged and expanded. This sub-category follows the phases of separation from

²⁸ Borg (2014) provides an overview of organisational liminality and categorises studies as: 1) 'Liminality as a process', 2) 'Liminality as a position' or 3) 'Liminality as a space' (Borg 2014, pp.18-19). On closer examination the boundaries were thin. Schechner and Appel's (1991, pp.3-7) breakdown of liminality in the field of performance delineates into: 1) Breaking down of time; 2) Breaking down of boundaries, or c) Transmission of knowledge.

the norm described above (section 2.2); and requires a clear purpose and narratives of specialists enabling successful workshop outcomes described above (Johnson et al., 2010).

Ongoing liminality is largely unique to organisational liminality and researchers in this area presume that businesses are operating in perpetual state of heightened liminal intensity (Sturdy et al., 2006).²⁹ This assumption of liminal permanency differs greatly from that majority of liminal research in that it moves away from the transformative potential of liminal characteristics. The sub-category contributed research on liminal competences and how these can be encouraged and fostered in uncertain contexts (Borg & Söderlund, 2014).

Some reviews and critiques of organisational liminality have suggested that the field would benefit from drawing on the original anthropological theory to progress the field (Johnsen & Sørensen, 2014). Söderlund and Borg (2017) emphasise that process is the closest organisational liminality sub-category to the anthropological origins and holds a collective and individual parameters (Söderlund & Borg, 2018). This research purposefully draws on organisational studies and the social science approach to liminality, although this is not an easy task. Seemingly endless variations of the liminal experience exist (Thomassen, 2009; Turner, 2012). The following section describes the range of profiles identified across liminal research.

²⁹ The implications of researchers accepting the premises of an ongoing liminality profile are alluded to throughout this research (although not addressed in depth). The main concern is that the normalisation of liminal intensity and engagement on an ongoing basis places continual and unending demands on employees to operate in constantly heightened states that are not sustainable, nor healthy (Sennett, 1998).

2.4 Distinguishing the Liminal Research Profiles

Entering into any liminal research discussion brings a range of contextual descriptors across a number of disciplines, each with different approaches and research agendas. The findings from a concept analysis are presented below in Table 3 and demonstrate the range in the liminal schools of thought. The variety of liminal disciplines include political science, sociology, psychology, theatre and organisational studies.³⁰ The table draws attention to the varied circumstances in which liminality is occurring and, by extension, the breadth of liminal research taking place.

The vertical axis is distinguished in the left-hand column by how people enter a liminal space (the manner of separation). This demonstrates that sometimes liminal entry is a conscious choice, and other times people have no option. The severity of separation influences the research that occurs in each of these contexts. The levels of choice and preparedness present in liminal space change the point of departure of research.

Unique characteristics to each profile are presented on the horizontal axis. In all instances liminal experiences are significantly disruptive. Variations in characteristics will change the experience. For example, the availability of non-liminal guidance or the level of stability in the environment an individual will return into, will influence the level of chaos experienced during a transition. Other

³⁰ Typologies have been presented in earlier decades. Moore and Myerhoff (1975, p.22) present a tripartite model delineated by the severity of 'rules' involved with the building of a community. Schechner (1991, pp.20-21) categorises liminal space as either private, restricted, or multi-space. Turner (1969) delineated *communitas* into: 1) existential or spontaneous, 2) normative 3) ideological. The current compilation examined these earlier profiles and included more recent literature from various disciplines.

textures and the way a transition is structured inevitably impact the extent that the space can be actively engaged (Miller & Friesen, 1980).

Occasionally the different profiles are interrelated. For example, Szokolczai (2014) explored crisis liminality and concluded it may become ongoing or permanent if a sense of structure is not regained. In contrast, York (2001) examined the context of a contemporary ceremonial experience that was nested within a greater internal liminal transition. York (2001) also suggested that a personal crisis can catalyse internal searching. The final profile outlined is designed liminality and draws together research pertinent to intentionally designing and facilitating organisational transitions. The profile of designed liminality informs the remainder of the study. Other differentiators include the level of guidance or non-liminar support represented during a transition.

Table 3: LIMINAL DOMAINS ACROSS THE RESEARCH SPECTRUM

LIMINAL PROFILE	Separation Catalyst	Liminal Experience	Texture of Re-Integration	Dimension Features Structure (Container)	Non-Liminal (Facilitator) Involvement
CRISIS	A crisis, abrupt, traumatic, unexpected	Untethered, drastic, high levels of stress. “...dangerous or polluting” (Newman, 1999, p.91)	Requires significant rebuilding of group identity, individual stability and resources to support.	Low “...the previously taken-for-granted order of things has actually collapsed” (Szakolczai, 2000, p.218).	None – Low Very few initially, although leaders and support people are likely to emerge or be called in following a crisis event.
Sources	School shooting (Powley & Piderit, 2008); Parents caring for dying children (Jordan, Price & Prior, 2015); Natural disasters. E.g. The Red River Valley Flood (Jencson, 2001); Accelerated social change within (Szakolczai, 2000).				
UNPLANNED or ACCIDENTAL	Connected with core cultural identity; Usually personal; Sudden Naturally occurring; Unexpected A gradual awareness that change is needed.	Potential stress. Anxiety. A lack of control. “drift or chaos” (Newman, 1999, p.91). “a time of confusion, insecurity, or uncertainty is that they feel they have lost the narrative thread of their life” (Ibarra, 2007).	One of the least defined liminal re-integration types as people enter randomly and integration is diverse.	Low – Medium Support emerges ad-hoc in often a reactive, rather than proactive way. Similarities to crisis with less trauma.	Low – Medium People may seek guidance if it is available.
Sources	Chagga / Huichol Communities (Myerhoff, 1975); Polish border town of Slubice (Rottenburg, 2000); Romanian's finding their cultural identity as part of the EU (Stoicescu, 2012); Questioning the meaning of life and finding it wanting (Whyte, 2002).				
TRADITIONAL CEREMONIAL (Rite of Passage)	A ceremony to symbolise transformation, or otherworldliness. Totally separated from the norm Protracted	Sacred; Significant; Ritual necessitates the adoption of new identity markers.	Through guidance of shamans, or ritual elders.	High – intentional disorder “...social order is purposely but temporarily suspended, and this very same order is solemnly reinserted at the end of the performance” (Szakolczai, 2000, p.218). “...tribal communitas is the complement and obverse of	High. Space held by ritual elders, shamans. Participants are scaffolded into the expectation or excitement of the coming ritual and are supported through their re-entry phase.

	Expected as part of community structure. Honouring shifts and changes.			tribal structure" (Turner, 1969, p.203).	
Sources	Any Indigenous transitions or developmental stages (i.e. a coming of age, or marriage ceremonies); Coming of age ceremonies (Turner, 1969); Initiation Rites (Blau, 1991).				
CONTEMPORARY CEREMONIAL	A liminar self-selects to be a part of the process. Varied. Organised by event planners or facilitator.	Intense ego vulnerability; ecstatic exploration of different experiential states; Fun and celebration.	Officially at the end of event or workshop. Attendees may move into the following "internal searching" profile if they have a significant insight during this phase.	High - Varied Space created by a range of organisers with a vision of an event or workshop. Often this involves evoking sacred-like feelings in a modern context.	Variable Non-liminar support is present during a ceremony, but a lack of follow up after the ritual or esoteric experience has been identified.
Sources	Festivals (Jennings, 2009; 2010); The Olympics (Chalip, 2006); Ayahuasca ceremony (Lewis, 2008).				
INTERNAL SEARCHING	An internal realisation that change is needed. Self-selection. A desire to deeply transform internally. People may begin to engage from an external trigger from another profile (e.g. crisis or ceremony).	Intense; vulnerable; A lack of control. "...consciously... stand outside normality" (Thomassen, 2009, p.18).	Seeking can take a number of years. This may be a mixed transition with support from other profiles.	Low - Emerging An internal or individual drive that is self-developed.	Variable Non-liminar assistance or guidance may be sought if required. Nevertheless, an individual takes responsibility for his or her own transformation. Extremely intense and vulnerable. Liminars have chosen to embark on an identity examination.
Sources	Seeking personal leadership development (DeHart, 2008); Being considered for redundancy (Beech, 2011); Finding one's self (Bolen, 1994; Rohr, 2002;); Pilgrimage (Turner & Turner, 1978 [2011], p.xxiv; LaFleur, 1979; Lewis-Kraus, 2012); Living a spiritual life (York, 2001).				

ONGOING / PERMANENT	An ever transient professional identity, or organisation. This profile can begin in any of the earlier profiles where a lack of willingness, lack of support, or inability to re-integrate occurs.	“...an ongoing state in people’s working lives” (Borg & Söderlund, 2014, p.3). “modern condition” (Czarniawska & Mazza, 2003, p.269; Garsten, 1999). “... both unsettling and creative” (Sturdy et al., 2006, p.929).	An inability to re-enter, return or integrate or understand new cultural identity sufficiently (Szakolczai, 2015). The intense instability of everyday structures are normalised and people begin to see this as ‘normal’.	Low – Internally emerging There are multiple influences but confusing or mixed messages. Structure is variable and liminars are required to be adaptable and competent in across a number of contexts and environments.	Low Responsibility is felt most by individuals. Surviving this profile requires self-resilience, self-reliance, and self-competence.
Sources	Temporary Workers (Garsten, 1999; Winkler & Mahmood, 2015); Consultant lifestyles (Johnsen & Sørensen, 2014); Periods of accelerated social change (Szakolczai, 2015).				
THRESHOLD CONCEPTS	Furthering one’s education in pre-established communities of practice (e.g. law, economics, teaching).	Transformative; irreversible; integrative; bounded (define boundaries); and troublesome.	Typically, at the end of a course or workshop. Not all students will grasp the knowledge at the level of practice.	High – pre-existing prerequisites into an established professional field (e.g., engineering, law, economics). Success depends on students accepting a pre-existing “scientific” approach and also “turn on the light” (Taylor, 2006) in grasping difficult concepts.	High – The presence of an educator is essential to this experiential learning ideology.
Sources	Teaching and Learning (Meyer & Land, 2003); Transformative learning (Meyer, Land & Flanagan, 2016); Emotional learning (Meyer & Land, 2005); Individual learning styles (Rattray, 2016); A community of practice (Timmermans & Meyer, 2017); Economics (Reimann & Jackson, 2006); Outdoor education programs (Bell, 2003).				

DESIGNED (Strategic) LIMINALITY	Intentional Designed for a specific purpose, of creating new, innovative or previously non-existent knowledge that can be integrated into the pre-existing structure through translatable action-steps.	Designed; Held; Ideally this is a reflexive space for debate that is consciously entered and exited where power is devolved by leaders.	Premeditated In the best case a solid re-integration is designed into the project. At the end of project or workshop space and includes follow-up.	Varied – Largely within organisational boundaries in formal and informal. “artificially produced” (Thomassen, 2009) Permeable ~ vulnerable to intrusions from wider environment. Structural similarities exist between designed liminality the ROP model.	High - “The arts practitioner is central as the mentor and guide who activates these elements to realise the transformative potential of a liminal time-space” (Atkinson & Robson, 2012, p.1354) Facilitators design, develop, holding and guide participants to leverage outcomes.
Sources	Strategy Workshops (Johnson et al., 2010); Designing communities (Hearn, 1980); Art workshops (Atkinson & Robson, 2012); Need for adaptations to the television industry (Tempest & Starkey, 2004).				

Source: Author compilation.

The divergences between these profiles highlight different characteristics and indicate areas where scholarly debate is occurring, these are expanded below.

2.4.1 *Crisis Liminality*

Crisis liminality occurs when an event is shocking and debilitating (Horvath et al., 2015; Jencson, 2001; Powley, 2009). A sudden and unexpected disruption of the existing social order causes floundering, and re-integration initially seems improbable (Horvath et al., 2015). People enter crisis liminality unexpectedly, as with the death of a loved one or a terminal illness being diagnosed (Little, Jordens, Paul, Montgomer & Philipson, 1998). Research in this space usually includes an encounter with mortality, either oneself or loved ones. Examples include a university shooting that resulted in multiple fatalities (Powley & Piderit, 2008), neo-natal emergencies (Bar-Lev & Vitner, 2011), and parents caring for their dying children (Jordan et al., 2015).

Under such circumstances, people discover a strength and resilience they were not aware of (Powley & Cameron, 2008; Powley, 2004). Particularly, "...following a traumatic organizational incident where operational processes are interrupted, and social relationships are damaged" (Powley & Cameron, 2006, p.15). People who were not previously seen as leaders can show their strength and help others in trauma if the usual leaders are absent, lost or disempowered by the trauma (Powley & Piderit, 2008). Although this profile is referenced in a number of fields there is an opportunity for future research that compares the findings across disciplines.

2.4.2 *Unplanned or Accidental Liminality*

Accidental liminality is triggered by unplanned disruption to established social structures that people are unprepared for, outside of a crisis (Myerhoff, 1975). Unplanned liminality is surprising, although occurs "perhaps from necessity" when the signals of needing to implement change have been ignored (Turner, 2012, p.1). However, people

retain a sense of their own identity and agency.³¹ For example, someone may have been avoiding change, so the process is unsettling, but they have the competences needed to overcome stresses or anxieties (Sturdy et al., 2006). Such times are beneficial to help people to define their "...sense of self and redevelop self-agency in response to disruptive life events" (Kralik et al., 2006).

2.4.3 *Traditional Ceremonial (Rites of Passage)*

Rites of passage or ceremonial liminality receives the most attention in the literature. Ceremonial liminality was championed by Victor Turner (1969; 1977) and anthropologists studying small-scale foreign cultures examining coming of age ceremonies, weddings, or harvests (Das, 1976; Pentikäinen, 1979). Transition in this instance was intertwined with the societal structure and rites which involved shamanic practices moving liminars into the spirit realm, and out again (Lee, 1991; Obeyesekere, 1991).

Some anthropologists argued that these rites were impactful because of the "ritual theatre" or the impactful use of symbols which co-created a sacred space (Turner, 1979b). Ritual theatre can be verbal and non-verbal communication that draws participants outside their norm (Schechner & Appel, 1991; Valencia, Valencia & Spicer, 1991). In ceremonial contexts, symbols include paint, masks, or the use of new language where the space itself communicates and supports a transformative process. An example of ritual theatre in the workshop context is the use of flashcards or props to elicit different behaviours from attendees.

³¹ Agency is one's ability "to influence intentionally one's functioning and life circumstances" (Bandura, 2006, p.164). Four properties of human agency include: intentionality, forethought, self-reactiveness and self-reflectiveness. Ongoing debate exists in the social sciences about the extent of control human beings have over their lives.

2.4.4 *Contemporary Ceremonial*

Contemporary ceremonial liminality is a profile focusing on modern celebration, ritual or adventurous contexts like festivals or the Olympics. The literature is predominantly found in the event and marketing space, although theorists across other fields have touched on the concept (Thomassen, 2015; Myerhoff, 1975). Chalip (2006) focuses on organisers designing and choreographing a sense of celebration. Successfully creating a “buzz” fosters a memorable sense of pride and social wellbeing beyond the conclusion of the event that has social and economic benefits. Contemporary ceremonial liminality is unique in exploring how to best leverage insights from contemporary events, although little attention is placed on the particulars of creating *communitas* (Chalip, 2006; Rentschler, 2006; Ziakas, 2014). This profile mirrors the approach taken in tribal celebrations, ceremonies or rites of passage (O’Brien & Chalip, 2008).

This liminal domain informs the current study in its recognition that individual organisers play a role in developing powerful group experiences; but raise some questions as the competences and specificities required to design and support these spaces are not comprehensively outlined.

2.4.5 *Internal Searching (Individual)*

Internal searching is a self-directed transition consciously pursuing meaning or sacredness in life. This can occur in a work context (Eriksson-Zetterquist, 2002), or outside of work such as a religious pilgrimage (Turner & Turner, 1978[2011]). Here, individuals motivate themselves through their change process, and begin experimenting and practice critical self-reflection (Beech, 2011). Individual identity with a work context relies on an individual’s drive and motivation to achieve change in a “two-way interaction” between the self and the work environment (Beech, 2011). In this manner, the

reconstruction of identity is a collective process that ultimately relies on internal tools to make the best decision for one's own career, and leadership trajectory (DeHart, 2008).

This can include use of tools like meditation and prayer to support questions about their identity (York, 2001). Often people will be unsure what they are seeking precisely, yet instinctively know that it is time to change. LaFleur (1979) describes this as "...characterized on all levels by an intentional suspension of all notions and expressions of order and hierarchy" (p.34). This self-directed learning signals a need to integrate previously unaccepted identities or selves. Following a tumultuous crisis or unplanned liminal transition, and individual may begin seeking in an attempt to reintegrate with a new consciousness (Bolen, 1994; Rohr, 2002). It is likely that people will seek others to help them during various intervals in the pursuit of their personal transformation (York, 2001). This dimension is also mirrored in personal development texts (LaFleur, 1979; Lewis-Kraus, 2012; Rohr, 2002; Turner & Turner 1978[2011]).

2.4.6 *Ongoing/Permanent liminality*

Permanent and ongoing liminality is a response to the rapid and fast-moving pace of change in organisational settings. This liminal perspective is in direct contrast to accepted position of liminality as a temporary condition. Instead, liminal characteristics, such as uncertainty and fear are positioned as common mainstays of working life in contemporary organisations (Barley & Kunda, 2011; Borg & Söderlund, 2014). Ongoing liminality is distinct from the other profiles and views that the intensity and paradox typical in business spaces is permanent, here to stay and likely in many modern organisations (Johnsen & Sørensen, 2014; Loacker & Sullivan, 2016; Thomassen, 2009; van Gennep, 1960[1909]). The concept has been pervasive and accepted in modern organisational theory (Bamber, Allen-Collinson & McCormack, 2017; Garsten, 1999).

Often organisations operating within this paradigm are caught in a paradox. They continually reinvent themselves as they respond to the greater environment, rather than their organisation's values within a stable structure (Hagel et al., 2016a). There is a high turnover of staff and those who remain become apathetic and feel unsupported in the workplace (Sennett, 1998). Long-term organisational knowledge is less likely which also changes the work environment (Tempest & Starkey, 2004). However, different personalities respond differently to this cultural shift with some flourishing.

The profile has contributed by highlighting the need to upskill people to understand and have the competences to operate within liminal business environments. Liminal competences become essential, "...so individuals can successfully avoid or handle the potential negative consequences of liminal work conditions" (Borg and Söderlund, 2014, p.4). Signals of an ongoing liminal environment include high stress and a diminished attachment to the workplace (Zabusky & Barley, 1997).

Sociologists view this blurring of life and work associated and permanent experience of liminality as problematic. Szokolczai (2000) argues that permanent liminality is a failure or inability to complete a full transition and is a failed attempt for a society to find homeostasis. Indicators that our greater society is operating in this space include an increased norm of businesses employing consultants (Johnsen & Sørensen, 2014), temporary workers (Garsten, 1999) and project-based work (Borg, 2014). Many accounts from this profile provide a narrative of the changing societal relationship to work and a change in power dynamics.

The implications for an environment high in ongoing liminality for the current study is that ritual theatre and symbolism becomes increasingly meaningless and irrelevant.

2.4.7 *Threshold Concepts*

Threshold concepts are a body of work driven by educators from teaching in professional domains. Threshold knowledge has many overlaps with the current discussion in the focus on the requirements of facilitating deep experiential learning experiences (Meyer & Land, 2005; Rattray, 2016). People who are learning new knowledge are typically undergraduate students being taught the foundational concepts, or “...underlying game” of a foundational concept for their chosen career or field (Perkins, 2006, p.42). Meyer and Land (2003, p.412) define threshold concepts as:

... akin to a portal, opening up a new and previously inaccessible way of thinking about something. It represents a transformed way of understanding, or interpreting, or viewing something without which the learner cannot progress. As a consequence of comprehending a threshold concept there may thus be a transformed internal view of subject matter, subject landscape, or even world view.

The characteristics that distinguish a threshold learning space from other learning areas is that is: 1) transformative; 2) irreversible; 3) integrative; 4) troublesome; and, 5) bounded (Meyer & Land, 2005).

This field has many similarities to this study, and the objectives of the current research. Especially research that has focused on the skills required by educators to guide students beyond their comfort levels (Cope & Staehr, 2008; Davies & Mangan, 2008). Key research emerging from this area includes Timmermans and Meyer’s (2017) framework that draws on the empirical and social construction of the different types of knowledge. Learning is cumulative and recognising this allows people to learn how to learn in a new way (Irving, Wright & Hibbert, 2019). Similarly, Rattray (2016) examined learner’s responses and behaviour, rather than their learning styles

as has typically been applied both within liminality and scenario planning.

A key point of differentiation between these profiles is the location of the “threshold,” as moving into an established community-of-practices (Timmermans & Meyer, 2017), or creating previously unknown knowledge (Scharmer, 2009). While subtle, this distinguishing feature influences some of the skills required by facilitators and participants alike, which can become lost in the threshold concepts narrative, although others are transferable to both contexts.

2.4.8 *Designed Liminality*

The seeds of a designed liminality profile are found in literatures that have focused on facilitating innovative programs. The profile draws on research examining innovative programs in schools and organisations (Atkinson & Robson, 2012; Bell, 2003; Beavitt, 2012; Bell, 2003; Carson, 2016; Howard-Grenville et al., 2011; Rubinstein, 2013). Ideally, participants engage with future-orientated knowledge with a pre-existing understanding of the requirements of the creative space they are being asked to enter (Johnson et al., 2010). Other characteristics include: 1) the presence of a guide (non-liminar) who is tasked with influencing participant behaviour, within a set of organisational deliverables (Johnson et al., 2010). 2) The group will be exploring knowledge that combines different ideas and disciplines; 3) no pre-determined map exists, although a stable organisational structure is present. Given three parameters of designed liminality, a number of locations could have served as locations for the current research, such as school programs, and outdoor adventure programs.

The remainder of this study places attention on growing and defining a designed liminality profile. Designed liminality is distinct from Turner’s lifelong body of liminal work that tended to focus on the power of ambiguousness to inspire lasting change. It positions liminal transitions as a cognitive, emotional and facilitated process. This work

leans towards the practical and created. Despite designed liminality being in its infancy, there exists much potential to further this discussion. The following section examines the gaps in the liminal theory and identifies opportunities that arose in this literature review.

2.5 Liminal Literature: Gaps and Opportunities

The existing literature highlights the potential to research and articulate the demarcations between designed liminality, and liminal spaces that are not intentionally created. Despite traditional liminality and rites of passage being intentional practices, many unanswered questions remain about purposeful liminal practice outside these contexts. In particular, the specificities of how people navigate liminal spaces and subsequently embed the insights they receive have not been widely studied. Instead, research largely follows the example set by early anthropologists who studied the structure of transition, and universal symbols informing change (Jackson, 1990).

Another distinct gap is the absence of any significant research on the role of non-liminars (facilitators). This requires attention in contemporary transitions, as non-liminars are essential to support liminars in and out of these transitional spaces (Shapiro & Carr, 1991). Besides from commentary acknowledging that a lack of sufficient environmental supports disenable the ability of organisations to implement (or embody) insights, little else is known about the best conditions for liminal transition right now. A narrative and study of facilitators will help to bridge this gap.

An additional barrier to furthering designed liminality is the growing organisational trend of discussing liminality as ongoing (Borg & Söderlund, 2014; Garsten, 1999). Liminal space is only effective in its temporary unique nature. When something that was once innovative or liminal becomes embedded in the overall structure, these spaces lose their impact (Simpson et al., 2009). When liminal experiences are regularly and repeatedly

invoked, the potency of the liminal characteristics and capability is negated (Cross et al., 2015). Instigating continual spaces of challenge is not sustainable, or healthy for employees, and instead indicates an inability to complete a liminal transition (Szakolczai, 2000).

Another under-scrutinised component of liminality is the liminoid. Further research about the distinctions between these two descriptors may create an understanding of the characteristics of business environments that are conducive to supporting change. Liminoid break-downs can occur at any liminal phase; even after liminars exit the transitory space. Examples include, a leader forcing or manipulating people against their will (Szakolczai, 2015); a lack of trust exists between participants (Tyler, 2006); or untenable conflict that is unable to be resolved (Hodgkinson & Wright, 2002; Turner, 1977; Wydra, 2015).

As the liminal review comes to an end, it is clear that liminality has been practiced extensively as an observatory practice, and that organisational liminality is a relatively recent phenomenon (Cross et al., 2015). The studies already pursuing a purposeful dialogue about intentional transitions are largely occurring in silos (Cunha et al., 2010; Feldman, 1990; Howard-Grenville, et al., 2011; Johnson et al., 2010; Mäklsoo, 2012; Thomassen, 2009). ‘Section 2.4: Distinguishing the liminal research profiles’ mapped the literature to provide a map of the common liminal profiles. This table emphasises both the lack of research that has focused on the design and facilitation of liminality.

The following section introduces scenario planning as a strategic organisational practice capable of informing these gaps. It first presenting the scenario planning history, application and scope of research in the scenario planning field.

2.6 A History of Scenario Planning

History is organized – but the present is always a blur (van der Heijden et al., 2002 citing historian David Hockey).

Scenario planning originated in the 1940s-1950s as a military simulation technique (Bradfield et al., 2005; Peterson, Cumming & Carpenter, 2003; Rohrbeck et al., 2015; Slaughter, 2002). In particular, the RAND Corporation, began using scenario thinking to develop different hypothetical strategic situations to assess military readiness (Bradfield et al., 2005). By the 1960s the changing social landscape dominated popular narrative and scenario planning began drawing corporate and academic attention. (Chermack, Lynham & Ruona, 2001). For example, SRI International a non-profit research institute was using scenario thinking to investigate social opinion in the United States (US) for political issues, including the Vietnam war.

In the 1970s, Royal Dutch Shell (hereafter Shell) began using the technique in an early iteration (Amer, Daim & Jetter, 2013; Cornelius et al., 2005). The company adapted the method to suit their strategic needs which enabled them to plan for global shocks that later eventuated (Wilson, 2000). Having withstood the 1973 oil crisis when other companies struggled to stay afloat helped popularise the method (Gardner, 1987). This increased the use of futures in business and helped many organisations successfully challenge widespread corporate assumptions (Rohrbeck et al., 2015). Shell continues to influence scenario practice and research in the current day.

The 1980s was a time of scenario planning evolution. Scenario techniques became increasingly embedded into organisations, and scenario planning adapted to stay relevant (Wilkinson & Kupers, 2014). Technological advances were an impetus for tools like technological road-mapping (Battistella, De Toni & Pillon, 2015; Farrukh, Phaal & Probert, 2003) and Delphi surveys being incorporated into the scenario planning

method (Nowack, Endrikat & Guenther, 2011).

Psycho-social tools also became more prominent around the 1980s. For example, Kees van der Heijden, who was then the head of the Shell futures department introduced a tool he called “deep listening” which continues to feature in the Intuitive Logics method (Wilkinson & Kupers, 2013). Deep listening asks facilitators to interview individual managers to make sure their concerns about the future were addressed alongside the data and creativity (Wilkinson & Kupers, 2013).

The 1990s found corporate enthusiasm declining for scenario planning and only 38% of American businesses reported using the approach (Hindle, 2008). Organisations who used the scenario method related mixed reviews on the benefits of the method. This is largely correlated with a relatively stable business environment in Western economies during this decade (Rohrbeck et al., 2015).

The 1990s in South Africa were amidst social change and The Mont Fleur Scenario Project occurred in this environment. The abolishment of the apartheid laws and policies heralded a considerable period of social change (Le Roux et al., 1992). Mont Fleur brought together people from different cultural backgrounds and services with the intention of building a united nation after decades of internal conflict and struggle (Beery, Eidinow & Murphy, 1992). The resultant scenarios were published in a national newspaper, and the insights sparked broader dialogue about the country’s future (Beery et al., 1992). Kahane (2012b) hypothesises that the projected level of conflict from the abolishment of apartheid was diminished as a result of this project.

Prior to the fall of the World Trade Centre on September 11th, 2001, the New York Board of Trade’s scenario project had decided to acquiring a second office outside the Centre enabling the organisation to continue operating following the attack. It was their scenario development that provided insight that The World Trade Centre, their then

premises, was at risk (Bilodeau & Rigby, 2007; Hindle, 2008). In the aftermath of September 11th, 2001, the use of scenarios by corporates in the United States rose to 70% in 2006 (Hindle, 2008). Other successful scenario outcomes have included a credit union recognising and acting on the danger of having a single corporate sponsor and focusing on a small market (Schoemaker & Day, 2009). As well as the United Parcel Service (UPS) transitioning to retail locations, away from a centralised distribution system (Phandis, Caplice & Sheffi, 2016).

The context in which a business approaches strategy and the future will differ between organisations. Scenario planning has been situated as an alternative to traditional scenario planning methods. Futures and strategic thinking has becoming embedded in mainstream strategic practice helping organisations respond to current or emerging market trends (Inayatullah, 1990; Mason, 1994).

Since the 1970s, the scenario planning research agenda has been embedding the method into strategic consciousness (Bradfield et al., 2005; Burt et al., 2017). The method's popularity has been aided by the increasing uncertainty in the global environment, new technologies that disrupt established businesses and unanticipated events continue to highlight the importance of future-orientated thinking as a component of strategic practice (Coates, 2000; Hubbard & Beamish, 2011; Kotler & Caslione, 2009). The adaptivity of the method amidst these factors have assisted scenario planning becoming an established technique that continually adapts to meet user needs (Goodwin & Wright, 2001; Scharmer, 2009).

The scenario planning method is discussed in the following section.

2.7 A Scenario Planning Method

Scenario planning is typically driven by an external facilitator or dedicated team who clarify the scenario process and explain the underlying aims of the method (Schwartz, 2009; van der Heijden et al., 2002). Wright, Bradfield and Cairns (2013a, p.631) suggest that the objectives of scenario development are:

- (i) enhancing understanding: of the causal processes, connections and logical sequences underlying events — thus uncovering how a future state of the world may unfold, and (ii) challenging conventional thinking in order to reframe perceptions and change the mindsets of those within organizations... Further
- (iii) improving decision making: to inform strategy development

The precise project purpose and pace is directed by senior executives who commission and initiate the process. Facilitators engage key personnel through interviews and initial meetings and building an understanding of the organisation (Wilkinson & Kupers, 2013). Facilitators also help organisations clarify project parameters from the outset and respond to any challenges as they arise (Burt & van der Heijden, 2003; Wiek, Binder, & Scholz, 2006).

A scenario planning project will gather internal and external data points (relevant to the business). These are then categorised into technological advances, political forecasts, employment trends, and other emerging influences and trends relevant to the business sector (Huss & Honton, 1987; von der Gracht, Vennemann & Darkow, 2010). This information is interdisciplinary and includes policy and practices happening in the present. Participants consider how likely these potential events are, and should they occur, how they will impact the future both in one's sector (in our example healthcare), and outside the area in sectors that interact with their own (for example information technology). The re-examination of future indicators emboldens people to

make connections and vital links between information that may not have previously been reviewed together (Wilkinson & Kupers, 2013).

The most creative phase is when participants come together to develop multiple future-orientated narratives (Chermack, 2011; Fosnot & Perry, 2005; Galer & van der Heijden, 1992; Junker, 2013). This usually occurs in a workshop where collaborative activities and independent problem solving occurs (Peterson et al., 2003). Franco and Meadows (2011, p.3) view that the strength of these types of workshops is that people experience "... the 'suspension of disbelief' and the conduct of novel and loosely-structured tasks that are at odds with the familiarity of everyday work routines." This allows robust debate and knowledge to be approached with a degree of versatility (Voros, 2003). Support is on hand from facilitators although people are encouraged to use their working expertise and intuition to complete tasks (Fosnot & Perry, 2005; Junker, 2013). The resultant scenarios then act as a foundation for a later stage of strategic development (Wiek et al., 2006). Other project outputs include developing strategic thinking competences from the scenario process (Schwarz, 1994).

The intensity with which a business commits to this creative phase and challenging mental models will differ between projects. Some companies will adopt an aggressive change approach and others will be testing the waters with more of a rote approach (Mason, 1994). The experience of a facilitator also influences the creativity experienced, with some inexperienced facilitators not having the confidence to hold uncertainty for prolonged periods of time (Burt & van der Heijden, 2003). Nevertheless, as an ever-evolving tool (Bradfield et al., 2005; Varum & Melo, 2010), the method can be adapted to meet the needs of contemporary corporate environments (Chermack, 2011; Martelli, 2001). This ensures that scenario development is likely to

remain a mainstay in strategic practice (Burt et al., 2017). Especially as businesses have the opportunity to engage with strategic planning in a robust way that is relevant to different sectors and a business's specific corporate needs (Goodwin & Wright, 2001).

Three broad branches are regularly cited by practitioners as Cross-Impact analysis (CIA), La Prospective approach and the Intuitive Logics approach. The examples below demonstrate the continued evolution and versatility of the scenario method.

Cross-impact analysis (CIA) draws from Helmer and Gordan's work building a forecasting system at the Kaiser Aluminium Company in 1966 (Huss & Honton, 1987). The approach uses an algorithm to generate curve-fitting historical data which is then cross-referenced with a range of causal and correlation variants (Bradfield et al., 2005). Like other scenario development approaches, CIA asks participants to develop multiple alternative futures yet it is less labour intensive than alternatives approaches.

The La Prospective, (The French Centre) emerged in France with philosophical work done in the 1950a by Gaston Berger at the *Centre d'Etudes Prospectives* (Bradfield et al., 2005). This branch is credited with being one of the first methods to combine scientific advances and political potentials and is predominantly found in public policy development (Godet, 2000). The foundations of this approach rest on creating collective visions and communicating a broad plan as to how this can be achieved. This branch has been expanded and is now largely championed by Michel Godet (Bradfield et al., 2005).

The Intuitive Logics approach uses analytical modelling and human analysis tools. This branch combines 'intuition,' professional expertise, strategic conversation, debate and collaboration and 'logic,' mathematical algorithms and research - to develop strategies for the organisation (Bishop, Hines & Collins, 2007; Huss & Honton, 1987; Kloss, 1999; Thomas, 1994). The resultant scenarios are then cross-referenced with potential scenario directions to make more versatile strategic decisions (Huss & Honton,

1987). This branch is popular as it helps produce flexible and internally consistent scenarios and develop the skills and communication of team members (Laurent, Friedman, Krantzberg, Savia & Creed, 2015). Royal Dutch Shell championed the Intuitive Logics approach and the company still uses it to influence its strategic development (Mietzner & Reger, 2005; Wack, 1985; Wilkinson & Kupers, 2013; Wilson, 1994). The branch has links to Herman Kahn's work at the RAND Corporation and with parallel projects at the SRI International and Global Business Network (Huss & Honton, 1987; Martelli, 2001). The consultancy referenced in this study most closely resembled this method.

The inquisitive nature of practitioners has ensured the method can be adapted to meet the needs of contemporary corporate environments (Chermack, 2011; Martelli, 2001). This ensures that scenario development is likely to remain a mainstay in strategic practice (Burt et al., 2017). Especially as businesses have the opportunity to engage with strategic planning in a robust way that is relevant to different sectors and a business's specific corporate needs (Goodwin & Wright, 2001). The scenario planning and futures literature demonstrates that the field has developed a systematic psycho-social process. Nevertheless, the discussion remains largely focused on the operational tasks. Limited attention is placed on the psycho-social outcomes, or how to foster and support these within the organisational context.

There are also a number of barriers to practising scenario planning. First, it is difficult to implement without an expert present. Second, the technique as a "fuzzy multi-field" (Marien (2002, p.263). A third barrier is a high demand on participant involvement, resources, and time for smaller organisations (Huss & Honton, 1987; Rohrbeck & Schwarz, 2013).

Another key barrier to the method is people's self-interest about their role in the unfolding strategy. Imagining the future activates people's worry about the future. In some instances, when people feel unsafe about their role in the workplace, distress and high stress levels can have threatening consequences (Hodgkinson & Wright, 2002). Andreescu, Gheorghiu, Zulean and Curaj (2013) state:

... an expression of participants' attempt to ensure that, in the future world, each party will have a seat at the table and a voice in the conversation. As a result, the construction of normative narratives may be interpreted in terms of an effort to smooth out tensions that are inevitably embedded in scenarios.

This factor may influence why some organisations find it difficult to implement insights gained during the process. Those who report successful project outcomes typically have pre-existing organisational practices that assist the process (Rohrbeck & Schwarz, 2013).

The scenario planning field has developed a systematic operational process that prepares people to navigate unanticipated events and uncertain business environments. Some guidance has been included for psycho-social design. This is achieved by preparing individuals and organisations to think about the future in a new way (Coates, 2000; Worthington, Collins & Hitt, 2009). Nevertheless, the discussion remains largely focuses on the operational tasks with limited attention placed on the psycho-social outcomes. Robust considerations of how to foster and support groups in dealing with a broad and uncertain future highlighted a number of gaps in the psycho-social narrative. In essence, as a practice, scenario planning would benefit from being considered from a psycho-social perspective.

2.8 Re-Defining the Research Problem

The foundations of liminality and scenario planning are positioned to address the aspects of uncertainty and transition. This section now moves out to examine a wider perspective and highlights the opportunity to understand the psycho-social design and facilitation of project spaces. There remains much potential to articulate the demarcations between designed liminality, and liminal spaces that are not intentionally created. Traditional liminality and rites of passage are intentional practices. However, many unanswered questions remain about how to purposefully curate liminal practice outside anthropological contexts. This section begins by examining the gaps in the discussion. In the second part of the section, attention turns towards the concepts existing within these profiles and how these foundations lend themselves to the present consideration of a practice-orientated discussion of liminality.

Scenario planning is an organisational practice that is already developing and pursuing liminal aims, and this research draws on the method insofar as it is already pursuing a liminal-like process. Scenario planning is a well-documented and established method with examples of success in a number of organisational contexts. The field has a large reference set to pursue. This provides a valuable location to begin exploring the practical needs of the liminal translation from theory to practice. Practitioners have extensively documented the purposeful development and fostering of these designed strategic spaces.

It remains that despite the potential, epistemological complexities exist in both fields that much be addressed before being able to discuss the design or facilitate and create such spaces. One challenge in progressing this aim is that both liminality and scenario planning have epistemological dilemmas that work against the primary drawcards of either practice. In essence, the strength of each practice is that it catalyses

new outcomes, rather than recreates old results. This requires cognitive versatility and transformation; which is at odds with continuing debates around theory, practice and methods in both fields.

To be able to discuss the collaborative creation of new knowledge requires acknowledgment of the strengths from each field as well as acknowledging the theoretical currents. These are well documented. For example, Timmermans and Meyer (2017, p.4) view that furthering a liminal practice requires:

... a need to shift conversations away from unproductive debates regarding the precise definition of the term 'concept' and instead honour the range of meanings this term may hold across disciplines.

In the scenario planning discipline, Spaniol and Rowland (2018, p.33) state:

Contributing fresh theory supposedly attends to the “dismal” state of theory, while contributing new typologies purportedly helps bring order to methodological chaos. Repeated over time, the contribution strategy breaks down. Effort to resolve the theoretical and methodological issue, which motivates re-statement of the claim in the first place, ultimately fails. In actuality, the field is distanced from its purported goals. The “dismal” state of theory encourages scholars to adopt theory that is not necessarily tethered to a common core, which does not contribute to a shared, foundational theoretical perspective in futures studies. Perceived chaos gives way to typologies, which, as they mount, contribute to the chaos they were meant to resolve. The end result, intended by no one, is that theory remains dismal and methods remain chaotic.

Other detailed expansions on these debates and parameters are found in other publications (Horvath et al., 2015; Thomassen, 2009).

Along this vein, liminality addresses a number of gaps apparent within the scenario planning literature. Liminality is a psycho-social container that complements the strategic management perspective. Scenario planning work is already claiming a cognitive role in strategy creation (Bradfield, 2008). However, the specifics of the psycho-social processes used within the method have been rarely discussed from a scholarly perspective. Scenario planning relies on group cohesion helps to encourage collaboration and healthy debate (Antonacopoulou & Gabriel, 2001). So, while it is apparent that scenario planning relies on people having distinct cognition styles and capacities (Rattray, 2016), and already designing groups that draw on detail orientated and big picture thinkers (Hodgkinson & Clarke, 2007). What is less apparent is the impact that debate, creativity and future-orientated has on participants when uncertainty is primed. What ensures success from a psycho-social perspective? Liminality provides one psycho-social perspective to begin addressing this gap.

Having acknowledged the theoretical debates occurring within the literature, it was established liminality and scenario planning will benefit from being considered alongside each other. There also remains much potential for scenario planning facilitators to enter more discussions in this area, especially amidst the breadth of experiential wisdom in the field. The research now turns toward this potential confluence in lieu of the research sub-question: *What are the psycho-social foundations of a practice-based framework for liminal spaces?*

2.9 Chapter Summary

Chapter two has examined the context, historical development and evolution of liminality and scenario planning. The chapter demonstrated that there is a gap between liminal theory and practice. There exists an apparent need to consider liminality under

new and practical conditions. It was demonstrated that in contemporary contexts, liminal research rarely discusses how to guide and support participants through challenging transitions. While interesting to sociologists and anthropologists, liminality has applicability beyond its current scholarly use and the potential for a practice-orientated framework was apparent. 'Section 2.4: Distinguishing the liminal research profiles' demonstrated the breadth of liminal profiles being researched. Very few of these profiles are focussed on the deliberate design, or fostering of distinctive liminal qualities. Relatively few studies are discussing how to navigate liminal spaces, nor the competences required to exit these experiences.

Despite the gaps, 'section 2.4: distinguishing the liminal research profiles' shows that the seeds of practice-orientated liminal research is in its infancy. Organisational practitioners' have emphasised the support that well-defined and purposeful objectives and clear structure have when instigating change. Contemporary ceremonial examples, like the Olympics show how "buzz" can be planned. When this is harnessed, the impact for stakeholders can be impactful, with many ongoing outcomes long after the liminal time. Whereas, traditional ceremonial liminality continually draws us back to the importance of symbols, stories and objects to support times of change, and remind people of the task at hand, regardless of the context.

Scenario planning was introduced in the second part of the literature review. As a field that has developed a systematic psycho-social process, scenario planning is proposed as a vehicle to help understanding the practice of designing and facilitating liminal spaces. Scenario planning is already an organisational activity where groups develop scenarios in a space and time apart from their everyday context. Groups are asked to have difficult discussions addressing their concerns about the emerging future. Groups are then tasked with using the more creative parts of their brains and build

potential narratives (scenarios). This has been noted as being cognitively challenging for participants to think in new ways.

Both liminality and scenario planning have strengths and weaknesses. Neither field is positioned to provide a definitive 'solution' to the gaps in the other field. However, together there is potential for liminality to inform scenario planning and for a broader and more comprehensive understanding of designing and facilitating liminality to arise.

Chapter 3: Mapping the Method and Methodology

This chapter describes the methodological underpinnings informing the research design and the concept analysis method used in this study. The concept analysis method is most suitable for maturing an existing theory. It draws on a variety of perspectives and delineates, compares, clarifies and identifies the relevant parameters to explore liminal theory in a new capacity (Morse et al., 1996). Empirical research practices like this have a long history of use in the social sciences and are commonly drawn on in both liminal and scenario planning research.

The primary concept being investigated in this research is a practice-orientated liminal theory. In chapter two the background of liminal research was outlined. It became apparent that although liminal theory has a significant historical grounding in anthropological theory, the contemporary practice-orientated liminal landscape is less substantiated. Practice-orientated liminal literature remains in different discipline-pockets and research rarely specifies the delineations between these disciplinary approaches, despite the different liminal fields having much to offer each other.

Chapter two also introduced scenario planning to help examine the broad and uncertain liminal landscape. As an established facilitated practice aimed at creating future-orientated knowledge, the field provides a vehicle to translate liminal theory to liminal practice. As such, the research sub-question directing this chapter is: *‘What is the best research approach to consider this foundational psycho-social practice-orientated liminal theory?’* Scenario planning has a wealth of practical and empirical literature considering how to build positive professional relationships, elicit support for building future-orientated strategy and the role of facilitators (Burt et al., 2017; van der Heijden et al., 2002).

The author worked in a consulting team in 2013 for a national Australian health

care organisation and the details of this project are also outlined below. Given the author's sociological background, the liminal displays in participant behaviours, emotion, debate and the interrelationship between the facilitator and the CEO deemed the project location to be suitable for the study of designed liminality. It is common in scenario planning for facilitators to reflect and publish insights from their own projects (e.g. Kahane, 2012b; McKiernan, 2017; Schoemaker, 1993; Wack, 1985; Wright, Cairns & Goodwin, 2009). Concept analysis was considered the best approach to explore the research aims and questions and to support the aims of refining liminal theory and begin having it validated in real-world settings.

3.1 Research Scope and Rationale

A concept analysis methodology framed the research approach and this section presents the reasons an emergent concept analysis approach was chosen. Concept analysis techniques inform the analysis and interpretation of the data in this study and allows a full exploration of two emergent, iterative and self-generating theories (Yanow, Ybema & van Hulst, 2012; Zikmund, Babin, Carr & Griffin, 2013). The qualitative research design enabled the examination of a complex strategic planning method in a localised context. This setting enables "...the meaning individuals and groups ascribe to a social or human problem" (Creswell, 2013, p. 44). Interpretative concept analysis studies use emergent strategies to facilitate further investigation of phenomena as these emerge in real time (Easterby-Smith et al., 2015; Sieber, 1973). This allows for the creation of new knowledge and some degree of flexibility as each stage of the study informs the other stages. Iteration is possible throughout the research as new research arises.

Qualitative research is best suited to studying psycho-social phenomena and is highly appropriate for undertaking a deeper exploration of the meaning ascribed to social interactions in businesses (Creswell, 2013). As qualitative techniques are reflexive and allow a focus on the interactive creation of meaning (Yanow et al., 2012); this approach is common in the social sciences and is increasingly being adapted to other fields, including business (Bradbury & Lichtenstein, 2000; Gold, 1997). The method is also applicable for the following reasons.

First, a positivist approach was inherently incompatible to the research questions being asked in this research (Massé, 2000). Positivist designs are most fitting when data is numerical (rather than verbal or textual) and there are clear and manageable contexts and variables can be adapted incrementally. A quantitative approach would not necessarily reveal the complexities being studied in this psycho-social research addressed within qualitative research (Massé, 2000).

Second, the concept of liminality arose from the researcher's field notes on the scenario planning practice from a two-day scenario development workshop. This phenomenon demanded a deeper analysis beyond the artificial use of the term. The concept analysis approach allowed the parameters of the liminal concept to be interrogated while also addressing issues emerging from the research as they occur (Yanow et al., 2012).

Third, upon commencing the liminal research it became apparent that there was limited dialogue about the particularities of practice, design or facilitation in contemporary settings. The parameters of a practice-orientated liminal theory were unclear and required in-depth consideration. Some practice-orientated discussions have emerged since this project began in 2013 and concept analysis was a suitable

qualitative methodology that enabled these to be encompassed into the current discussion.

Fourth, scenario planning theory had its own gaps. The two areas complement each other, but as each theory is situated in a different discipline (social sciences and business), this confluence required additional reflective consideration. Concept analysis accounted for the lack of pre-existing research norms or 'best practice' to discuss two different areas (Clifford & Marcus, 1986; Romme, 2003). It took longer than expected to make decisions around the best discourse to present the findings that did not lose the strengths of each approach. The workings and lexicon between the two fields are presented in 'Chapter four: 'Uncharted waters': Scenarios as liminal space.'

Fifth, a paradox exists between theory and practice in both areas in each field's own publications. Liminality and scenario planning adapt their methods to meet context, need and circumstance and have a purpose of expanding someone beyond their known cognitive experience which can be paradoxical to positivist research approaches. Spaniol and Rowland (2018, p.33) suggest that new approaches are needed with focus on the "... richness in theory and method" arguing that the "...solution is not an expansion of theory and methodological typology but substantially enhanced empiricism to down-select between theoretical and methodological options." In other words, addressing this paradox demands a response beyond the status quo and the movement outside a pure critique of theory or refining existing knowledge. Concept analysis meets this need.

Sixth, scenario planning began as an alternative practice to stringent strategic planning, but contemporary discussions are often indiscernible from contemporary strategic planning norms today. Pockets of scenario planning communities-of-practice are clustered together and have similar narratives emerging from Shell realising the need to pursue the validation of the method (Wilson, 2000). Scholars

have supported the institutionalisation of the method in Europe at Strathclyde University in Scotland (e.g. Bradfield, Cairns & Wright, 2015; McKiernan, 2017; Wright, Cairns & Bradfield, 2013b). These factors have helped scenario planning become embedded within the strategic planning rhetoric (McKiernan, 2017). The downside has been that reaching this goal has minimised some essential components to the scenario planning method, including 'intuition' and 'play.' Concept analysis allowed the concentration on scenario planning's disruptive and explorative origins outside of the typical narrative.

Seventh, this research was a real-life consultancy and the current author was both a researcher and a consultant. She held a role between insider and outsider status (Coghlan & Brannick, 2014; Mercer, 2007). "Insider status" is when a researcher continues works within the organisation they are studying; whereas outsider status is where the researcher is not directly involved with the research asides from their study (Coghlan, 2001). As the researcher was only occasionally interacting with the organisation and was not directly invested in the internal operations her role within the project meant she had some professional understanding of the business (Evered & Louis, 1981); which also enabled reflective analysis of practice and theory to occur.

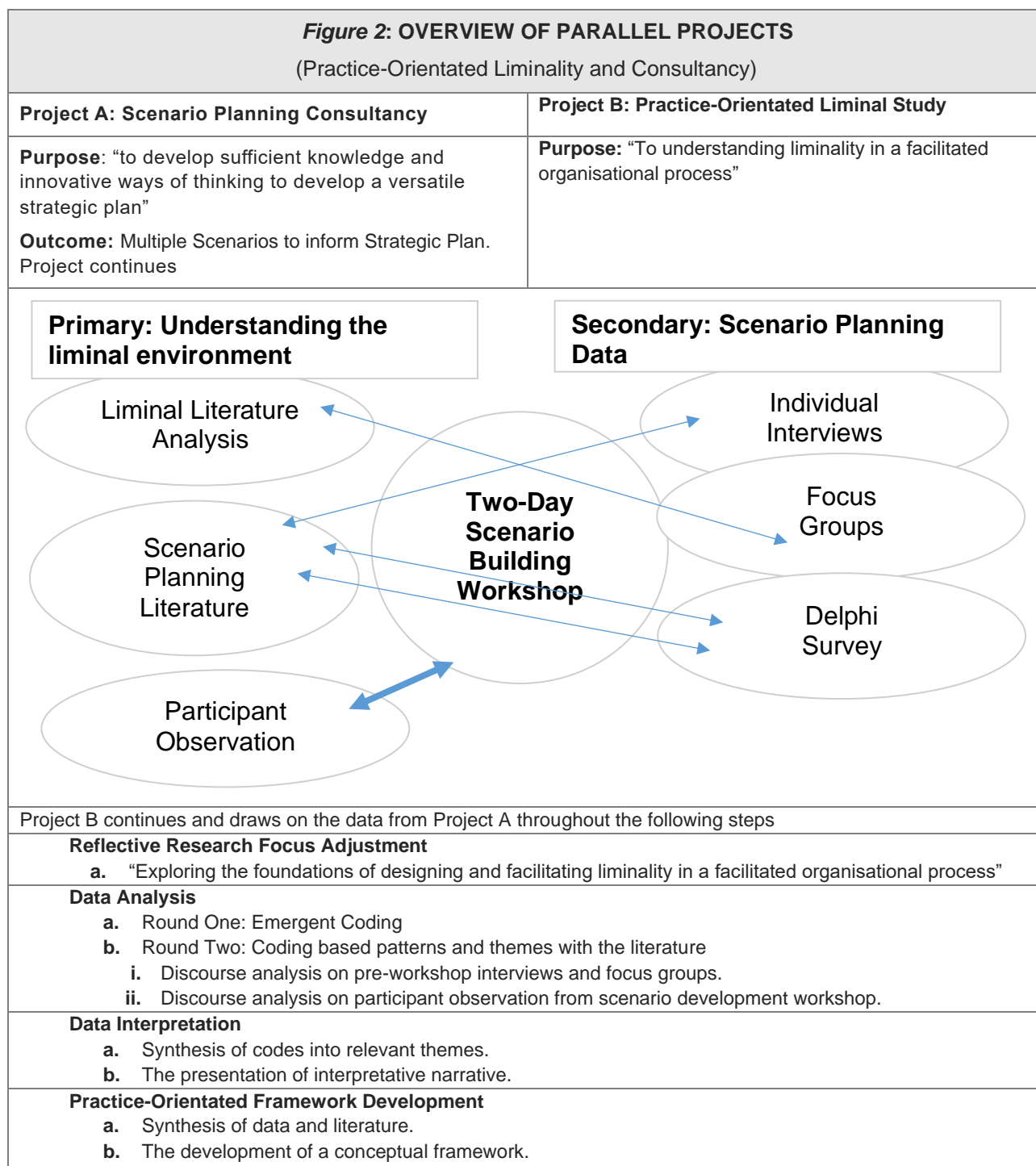
3.2 Research Design

The current research occurred alongside a large scenario planning consultancy (hereafter 'project A' or 'the consultancy'). The study on practice-orientated liminality is discussed as 'project B.' The current researcher worked across both projects A and B. For the consultancy, she was an assistant facilitator and took participant observation field notes alongside two other facilitators. All data was collected for the purpose of developing four future-orientated scenarios for project A. The researcher was in the

consulting team in her capacity as a sociologist with expertise in project delivery, workbook development, and workshop facilitation.

Data analysis for project B was done after the author's role in the consultancy was completed. She was not present during individual participant interviews or focus groups, but contributed to the analysis of the data sets Project A. She was not involved with the Delphi survey collection or analysis in any capacity during the consulting project A. However, she did analyse this data as a part of project B with the new research questions.

'Figure 2, overview of parallel projects' presents a visual interpretation of the interrelationship between the scenario planning consultancy research, project A, and the ethnographic observational tools used to record social interactions for project B. Data from project A was triangulated across a Delphi survey (two rounds), prior to individual participant interviews and four focus groups taking place; which was supported by archival research to understand opportunities for organisational gain (e.g. Babbie, 2013; von der Gracht & Darkow, 2010; Mullen, 2003).



Source: Author Interpretation

3.3 Project A: The Consultancy

The scenario-informed strategic planning consulting project, ‘project A’ was commissioned by a client organisation that is using the pseudonym in this research of ‘Service Ltd.’ The aim of the project was to develop a robust strategic plan to

inform the next strategic planning cycle. Project A took place over one calendar year in 2013 and most closely reflected an Intuitive Logics method described in 'section 2.7: A scenario planning method.'

The agreed project objectives were to “examine the shape of the future so that better strategic decisions can be made in the present” and “develop sufficient knowledge and innovative ways of thinking to develop a versatile strategic plan” (Project terms of reference A., 2013). The deliverables were to “develop a set of feasible future scenarios in order to develop the 2015-2019 Strategic Plan” (Project terms of reference B, 2013).

The client organisation Services Ltd. is a private health care group operating in metropolitan and regional areas across Australia. At the time of the project, there were 12,000 - 14,000 employees in 40 sites nationwide. Significantly, new strategic choices had already commenced, allowing the organisation to enter a new arena with new parameters. Despite this new direction, the organisation's values were obvious in the areas of recruitment, training, reflective practices, and service delivery. Different boards informed strategy, values and organisational development.

The organisation's governance structure was hierarchal. The leadership group is referred to as 'the board' or 'the leadership group' throughout this study. The overarching leadership style at Services Ltd. most closely demonstrated hierarchal stewardship, although management styles did vary across sites and managers (Jeannet & Schreuder, 2015). A high level of discernment was demonstrated by those involved.

The organisation had not previously used scenario planning as a strategic management tool. They were curious to “try it out” and to learn the scenario planning method for their future operational use. (personal communication, July 2013). The

CEO of Services Ltd. was introduced to the lead consultant through a recommendation from a colleague. A steering committee made up of six people of similar status from different parts of the organisation was created for the purpose of guiding and advising of the project parameters. The lead facilitator reported regularly to this group. The assistant researchers/facilitators reported to the lead facilitator and each person had worked with him in other projects previously. In this manner, the scenario-informed strategic planning intervention was facilitated, and the lead consultant taught the organisation's management the scenario method.

3.3.1 *Participants*

Each scenario planning project participant was selected by the strategic steering committee and approved by the Services Ltd. CEO. In total, 73 people provided data in one or more formats including: 1) individual interviews; 2) focus groups; 3) Delphi survey (two rounds); and, 4) participating in the scenario development workshop.

- a. Individual participant interviews (n=25)
- b. Focus group data (n=13).
- c. Delphi Survey (two rounds) (n=51).
- d. Participant observation of the scenario development workshop (n=26).

Interview participants were provided with an *Information Statement* outlining the details of the research project and completed a *Consent Form* including permission for digital recording. Two interviewers were present to minimise researcher bias. All interviews and focus group transcriptions were reviewed by participants before inclusion in the analysis.

The focus group participants (n=13) were members of the Services Ltd. Board and had similar organisational status. All interviews were analysed for themes,

however to maintain organisational confidentiality only four interviews were cited in chapter five due to the research agreement

Delphi survey (n=51) participants were internal site managers across the different sites and were not a part of the scenario planning workshop. A Delphi survey was distributed via the consulting team to 60 managers across all departments and locations of the organisation, and 51 employees responded to two survey rounds. Participants were aware of the scenario project and organisational objectives. The number of years Delphi respondents had worked at Services Ltd. ranged from 1 to 25 years, with a mean of 7 years. Only three respondents were non-Australians and the majority had postgraduate qualifications (n=31) while 12 had bachelor's degrees and those remaining not disclosing their education.

Those who attended the scenario development workshop were internal managers and directors across the organisation's sites and board members. Many of those attending had been interviewed in the focus groups and individual participant interviews. These participants had an average of 8.8 years' associations with the organisation.

All organisational data was collected for the purpose of developing strategy, with identifying organisational data was excluded from this project. Having been chosen by the steering committee and CEO, it is entirely possible that participant bias existed within the consultancy data as it was collected for a project A, which had a distinct purpose from Project B. Nevertheless, these data sets inform the designed liminality study. Focus was primarily on the conditions informing the resulting participant psychosocial creation, trust and group interactions. In other words, the data collected for the scenario planning was triangulated with literature through consultant/research participant observation field notes and reflections.

3.3.2 *Individual Participant Interviews and Focus Groups*

Individual participant interviews and focus groups are a common practice within the scenario planning Intuitive Logics approach (Ratcliffe, 2002; Wilkinson & Kupers, 2013). Individual participant interviews (n=25) and three focus groups (n=13) involved influential members of Services Ltd. were undertaken to gain an understanding of the individual and organisational perspectives current in the organisational mindset and topics like brand and strategy (Ratcliffe, 2002). Focus groups and interviews were semi-structured strategic conversations and spanned three to six hours (Curry & Schultz, 2009). The questions were specific to the organisation and for confidentiality are not included in the appendix. Some examples are provided below. Project A's research questions were established to gain insight about the organisational culture and perspectives individual participants had about strategy at the time of the scenario project. Examples included:

- 1) *If you could put 3 questions to a clairvoyant who had complete knowledge of the future of this sector, what would they be?*
- 2) *What would be the constituent parts of a best possible world for Services Ltd. in 15 years' time?*
- 3) *In a worst possible world for Services Ltd. in 15 years, what would be your fears?*
- 4) *What pivotal events from the past provide good lessons for the future?*
- 5) *What major long-term decisions is Services Ltd. facing now?*
- 6) *What major constraints to future progress do you see inside and outside the organisation?*
- 7) *If all constraints were removed and you can direct Services Ltd.'s future, what would you do?*

These interview questions were not developed for the purpose of understanding designed liminality but within the context of strategic planning deliverables. They were still examined within the parameters of liminality for project B.

3.3.3 ***Delphi Survey***

A Delphi survey was distributed via the consulting team to 60 managers across all departments and locations of the organisation. Participants were aware of the scenario project and organisational objectives and the response rates were around 80% with 51 employees responding. Delphi surveys are useful to gather information in an anonymous way to encourage survey participants to answer as honestly as possible (Mullen, 2003). Delphi surveys are now a common feature of scenario planning (Wright et al., 2013b). The questions draw out opinions about key points of interest to the management team (Entrekin & Scott-Ladd, 2014). When any different opinions exist, or points of conflict or tension are found, a new survey devised with different questions. This is considered to help overcome different opinions, statuses within an organisation and to mitigate the influence of power or group think (Mullen, 2003).

For the consultancy, survey one (S1) was one round of questions focused on understanding individual participant perceptions of the strengths, weaknesses, opportunities and future worries for the organisation (Keeney, Hasson & McKenna, 2011). Survey two (S2) was another round of different questions sent to the same participants. Only two rounds were required before saturation (coherence) was achieved. Participants were able to revise their statements based on the information described from the analysis. The results derived from the analysis were presented to the leadership team after each round.

The author was not involved with the coding or organisation of the Delphi survey in any capacity for the consultancy. She analysed the data for the first time as part of this

current project. This analysis with a new research focus drew forth a social science view of the organisational interactions that occurred during this scenario-informed strategic planning project.

3.3.4 *Participant Observation: Scenario Development Workshop*

The optimal fieldworker should dance on the edge of paradox by simultaneously becoming one of the people and remaining an academic.

The term participant-observer reflects even as it shapes the fieldworker's double persona (Rosaldo, 1993, p.180).

Participant observation field notes were collected during the two-day scenario development workshop for the purpose of project A by the current researcher. The field notes were taken from a sociological perspective. The point of interest were the social interactions occurring within the strategic scenario development space. Participant observation allows the observer to be close to those being researched, thus providing "...a model which can serve to let us know what orders of information escape us when we use other methods" (Becker & Geer, 1957, p.28).

Fifty-seven pages of ethnographic field notes were taken during the two-day scenario development workshop. Day one of the workshop involved participants identifying key sector influences, aggregating key issues and ranking issues by uncertainty (Huss & Honton, 1987). Day two was an iterative process where a range of scenarios were formed based on quadrants of high importance to low importance; certainty to uncertainty and desired and undesired. The day concluded with participants acting out their respective scenarios using objects they could find in the room. Services Ltd. reported being inspired in their own internal process to translate

the scenarios to strategy based on risks and opportunities that arose during the project.

The researcher also wrote up reflective notes of these notes more comprehensively in the evenings. This included reflection notes on the process, and retrospective notes about conversations heard, or observations made. Continual liaison occurred between the lead facilitator and researcher clarifying observations regarding individual participant (liminar) and facilitator (non-liminar) activities (including planning and engagement). The field notes focused on both the discussion process and the conclusions the participants came to each day.

3.4 Project B: Practice-Orientated Liminal Study

The literature and the data collected from a scenario-informed strategic planning consultancy was analysed with new research parameters and research questions. A thematic analysis and concept analysis approach considered the concept of liminality. This resulted in the development of a conceptual designed liminality framework resulting from the components are outlined below.

3.4.1 Literature Review

The extant literature continually informed the project design, data analysis and theory building. The first scan of the liminal literature sought out unique pre-determined terms unique to the liminal literature including: liminality, non-liminars, liminars, rite-of-passage, space between, and *communitas*. The literature search was not limited to the field of organisational studies and included the fields of anthropology, social sciences, politics, and healthcare. Articles were identified from a wide range of databases including Emerald Insight, Taylor & Francis Online, JSTOR. These articles informed sub-question 1: *How does the liminal literature currently discuss the psycho-social design and*

facilitation of project spaces? While there was a common experience of liminality, each profile had a distinctive component of liminality that influenced the research occurring in that area. A focus on designing liminality was determined to be sparse.

A second literature review was carried out across scenario planning, scenario development and futures literature. This literature review focused on the sub-question 2: *How does the scenario planning literature currently discuss the psycho-social design and facilitation of project spaces?* This research question drew out pertinent psychological and social research focused in the fields of scenario planning, scenario development, Intuitive Logics, strategic conversation and strategic thinking in the first instance. It was demonstrated that the field of scenario planning will benefit from considering the psycho-social conditions that support the implementation of the strategic planning method.

Given these findings and the two distinct literatures (liminality and scenario planning) 'Chapter four: 'Uncharted waters:' Scenarios as liminal space' is dedicated to examining the overlaps and potential confluence across the two fields. This synthesis informed the second round of data analysis on the consultancy project data and the relevant associations, similarities and gaps were considered during the first round of analysis on the consultancy data. This amalgamation of the two literatures provided a platform to support a deeper engagement in alignment with the research objectives.

3.4.2 *Data Analysis*

All data was coded using NVivo 11 in two rounds. The first round identified broad emergent themes, and the second round coded the same data using known liminal terms to refine the analysis (Schiffrin, Tannen & Hamilton, 2001). This enabled

a continual reflective feedback loop that accounted for both literatures and emergent findings.

The concept analysis approach considers data within its specific context and considers verbal and non-verbal cues. Together these influence others and inform people's construction of the world (Brown & Yule, 2003). Concepts are analysed considering discourse that includes: "(1) anything beyond the sentence, (2) language use, and (3) a broader range of social practice that includes non-linguistic and nonspecific instances of language" (Schiffrin et al, 2001, p.1).

The terms used in the second round of analysis converged in themes that were common in both liminality and scenario planning discourses. Examples include: Organisational identity (Ashforth, 2001; Field, 2012; Tansley & Tietze, 2013); learning frameworks (Chermack & van der Merwe, 2003; Meyer & Land, 2005; Rattray, 2016); personal identity (Beech, 2011); change processes (Howard-Grenville et al., 2011); metaphor (Turner, 1974; Clark & Salaman, 1996); narrative and storytelling (Bowman, McKay, Masrani & McKiernan, 2013; Clark, 1998; Conquergood, 1989); time and space apart (Turner, 1967; van der Heijden, 2005).

The exclusion criteria for the data analysis included organisational specific data. This was extended to clinical terminology specific to the scenario-informed strategic planning project that fell outside the psycho-social research questions directing project B.

3.4.3 *Abductive Theory Development*

Abductive theory refinement is relevant for research addressing conceptual innovation (Dick, 1993; Humphreys & Watson, 2009). Abductive theory is appropriate when data is being revisited, deconstructed and considered through a new lens, as in the current study (Timmermans & Tavory, 2012). Such an approach was necessary

for a number of reasons. First, amalgamating two distinct areas of knowledge (liminality and scenario planning) required each was considered distinctly and subsequently re-considered together. Abductive theory allowed decisions to be made about which of the respective norms and assumptions from each area to take forward. Second, the approach allows for acknowledgment of the gains made from the observatory social sciences to be included. Third, the reformation of a theoretical lens into a practice-orientated lens requires this innovative step in a new direction and opens up new scholarly areas for future discussion. A focus on two disciplines meant that a critical examination of epistemology was required, and care was taken to reflect on the choices made at each stage of the research. This approach allowed the presentation of the designed liminality framework in chapter six that focuses on facilitators and the individual's experiences in a new way.

3.5 Limitations

A number of limitations were identified during this empirical study. These are addressed in 'Chapter seven, section 7.2: Limitations to the study including: 1) A lack of action-orientated liminal models to guide or use for the purposes of this research. 2) The position of a research project within the boundaries of a consultancy project. 3) The ethnographic examination of a single organisation. 4) The combination of two distinct epistemological disciplines, the social sciences and business studies, also provided some conceptual limitations.

To mitigate these limitations, consultation was made throughout the research with academic and professional experts. Ongoing feedback from these cohorts designated that this study was best suited to focus on building a framework to support liminality as it happens "on-the-ground." As such, this research is an

intersection of theory and practice addressing the full intentional process of liminality from the design and development through to the translation of insight into strategy. It is hoped that future research both tests the conceptual framework presented here; while also addressing some of the limitations encountered during this research.

3.6 Ethical Considerations

All data was de-identified to ensure the anonymity and confidentiality of individual participants at *Services Ltd.* and the strategic details of the organisation. All focus group and interview participants were able to review their transcripts to ensure that any sensitive organisational content was removed. This opportunity allowed participants to provide additional consent and articulate and communicate any additional viewpoints they wanted to contribute. At all times the confidentiality of participants and organisational information was assured to prevent potential disruption to pre-existing social and workplace relationships. All participants were informed that ethics approval had been granted by *Murdoch University: Human Research Ethics Committee, Project number 2013/097.*

3.7 Chapter Summary

This chapter provided an overview of the research design and described the parallel consultancy project. Of key importance is the foundational status of this study. The sub-research question guiding this chapter was: '*what is the best research approach to consider this foundational psycho-social practice-orientated liminal theory?*' The concept analysis approach was determined to be the most suitable for this project when ascertaining a preliminary interrelationship between research areas, in this case, scenario planning and liminality. This relatively new focus necessitated an ontology,

epistemology and methodology that supported the exploratory nature of this project that supports a new research direction for organisational liminality.

Two rounds of discourse analysis were undertaken using an interpretative concept analysis approach across the data sets. Literature, secondary data and observational field from a two-day scenario development workshop at Services Ltd. were analysed and organised into a framework that complements the theoretical gaps in each of the fields.

The following chapter presents the associations and differences between liminality and scenario planning; with a focus on clarifying a discourse to examine liminal spaces and scenario planning.

Chapter 4: 'Uncharted Waters': Scenarios as Liminal Space

This chapter consolidates the psychodynamic variants between the scenario planning and liminal literature. Chapter two identified the historical and contextual elements of the two theories. Using the concept analysis method, as outlined in chapter three, this chapter establishes that van Gennep's liminal framework was never intended to be a replicable model facilitating transitional practice. It is asserted that if liminality continues to be discussed in continuation of the anthropological techniques and norms that the liminal theory will be unable to contribute greatly to the organisational space.

The chapter is guided by the research sub-question: *'Is scenario planning suitable to inform the practice-orientated design and facilitation of liminal spaces?'* The chapter found that as a psychological and social planning tool, scenario planning is well-suited to the facilitation of liminality. Together, the two frameworks are collaborative and inform different aspects of transition. This first part of the chapter defines scenario planning as a psychological and social tool. The comparison of liminality and scenario planning demonstrates that there are similarities between each. Scenario planning speaks about similar properties and practice-orientated objectives that are observed during liminal transition. For example, when the two frameworks are compared and contrasted, the liminal phase transitions: 1) separation; 2) liminality; and, 3) re-integration have similarities to the scenario planning phases: 1) data gathering (inputs); 2) foresight; and, 3) data outputs (scenarios). This interrelationship is not presented as synonymous, but rather collaborative.

The second part of the chapter draws some conclusions between the interrelationship of the two theories. Both scenario planning and liminality rely on an

initial challenge that establishes the need for the questioning of participant's mental models. In this way, similarities occur in the psychological, emotional, and social reactions (liminal characteristics) evoked as participants move to achieve organisational objectives. Liminal characteristics are most apparent when people need to question their engrained patterns of thinking. Four characteristics: 1) challenge, 2) paradox, 3) shadow and social drama; and 4) co-presencing or *communitas* are apparent in liminal and scenario planning accounts.

Disparities exist between scenario planning and liminality. Two key areas of difference in the two fields include the presentation underlying discourse, or manner in which findings are contributed, and the way facilitators are discussed. Although no clear distinction exists between the two, scenario planning facilitators are a key presence in this field where as liminal facilitators are rarely mentioned. The literature situates scenario planning as a scaffolded activity that challenges and stretches people's cognitive versatility (skills and competences). Other points of difference include scenario planning having lent away from a psycho-social and psycho-emotional approach. These differences complement the gaps in the liminal research, and vice-versa. Together, the frameworks inform the subsequent analysis of the scenario-informed strategic planning data.

4.1 Scenario Planning as a 'Cognitive Device'

Scenario planning is inherently a social and cognitive practice. Limited scholarly attention has been placed on the interrelationship between the cognitive demands of scenario planning and establishing a lasting shift in cognitive versatility. This section examines a sociological and psychological view of scenario planning. Scenario planning is known to play a role in challenging engrained psychological

heuristics, and subsequently expanding people's mental dexterity. van der Heijden (1996, p.51) viewed that the practice is a "cognitive device." This narrative is widely imbued within scenario planning literature, although an understanding of the implications of the premises on which the body of work is built is not always examined.³²

4.1.1 *The Sociological View*

Scenario planning is a location of conflicting psycho-social behaviours, within any group's interests and visions of the future. When scenario planning was first introduced into strategic practice it was distinct from the traditional strategic planning approaches at the time (Wilson, 2000). Instead of assuming linear growth, companies were encouraged to draw on their imagination, intuition, and uncertain trends (Wack, 1985; Wilkinson & Kupers, 2013). The success by Shell in foreseeing the 1973 oil crisis opened other multinational organisations to consider countering linear ways of strategic thinking (Gardner, 1987; Wilson, 2000). Despite scenario planning being strategically revolutionary at the time, the method has since become more mainstream. Contemporary scenario planning endeavours are used alongside the linear strategic planning norms, rather than as a stand-alone practice challenging the collective view of the future, as was the case with earlier accounts.

The consequence has been a variety of epistemological approaches to scenario planning, each with different views of how much foresight is 'allowed.' Some organisations have a pre-established concept of how they want the future to be (Hughes, 2013). In this instance, the intention is to secure the already

³² This is similar to the manner in which Turner's liminality theory has been accepted and sustained as the premises of liminality, without question by many theorists.

established future vision in a robust, secure and evaluative manner (Hughes, 2013). In all instances the completion of a scenario planning project will require some degree of future-orientated thinking. Although there will be variances in the degree to which future-orientated knowledge and imagination is genuinely invited (Inayatullah, 1990; Kahane, 2012; Mason, 1994).

Organisational norms will influence the outcomes of a project. The intentions are not always obvious to those inside the organisation (Tyler, 2006). For example, decisions will be based on the group, rather than individuals taking the time to think deeply of new ways to engage with the future (Korte & Chermack, 2007; MacKay & McKiernan, 2018; Seligman, Railton, Baumeister & Sripada, 2013). There may be contradictory narratives already operating within a business (Schwartz, 2009). In other instances, an organisational culture will reward compliance or employees will be so accustomed to thinking mechanistically that they will not be open to new ideas that will disrupt what is known (Hodgkinson & Wright, 2002; Moyer, 1996).

Regardless of the approach taken, there are a variety of individual psycho-social components and pitfalls taking place during a scenario planning project. Hughes (2013) argues that there is always an inter-relationship between the self-interest of individuals and the organisation's intention (Hughes, 2013). Structural, political and cultural influences also come into play (MacKay & Tambeau, 2013). Other times, organisations themselves have deeply embedded cognitive heuristics and are not primed as an organisation to engage in the practice (Burt et al., 2017).

4.1.2 *The Cognitive View*

At an individual level, a variety of psycho-social tools are used during a scenario planning project to prepare people to hold multiple possibilities in their mind at any one

time. This ability to manoeuvre between different potential futures and cognitive versatility plays a key role throughout the process (Franco & Meadows, 2011).³³ The espoused suggestion is that scenario planning will prepare participants to work with new information on an ongoing basis and cognitive lens depending on the task at hand (Aligica, 2005; Hodgkinson & Clarke, 2007). This ability to envision a wider interpretation of the future than the one they currently see is viewed as necessary in an ever-changing world (Bradfield, 2008; Nonaka & Toyama, 2003; Wilkinson & Kupers, 2013).

Imagining the future can be taxing as established mental models can be difficult to change (Galer & van der Heijden, 1992). Despite the anxiety people experience with the everyday workday, there can be a lot of resistance to scenario planning. Neural pathways are primarily established to draw on past memories; whereas thinking into the unknown requires more effort than continuing the status quo (Schacter, Benoit, De Brigard & Szpunar, 2015). This is heightened when participants have no concrete frame of reference for what is coming in the future (Schacter & Madore, 2016).

A scenario planning project can present an overwhelming amount of exposure to new data, and sudden changes in direction in contemporary organisations can trigger a host of responses (Hodgkinson & Wright, 2002). A common reaction to so much data at irregular intervals is overwhelm which manifests as anxiety, or apathy (Hagel et al., 2016a; Ito & Howe, 2016). When people resist

³³ It is not essential for an entire group to practice cognitive versatility, and any one individual may draw people towards different ways of thinking (van der Heijden et al., 2002). When individuals understand how to successfully operate within the process, they can truly evince change (Hodgkinson & Healey, 2008). The scenario planning literature considers these individuals to be "... remarkable people ... intensely curious but sharp observers, who understand the way the world works and have their finger on the pulse of change" (van der Heijden et al., 2002, pp. 167-168).

thinking outside the box, they can demonstrate a range of functional and dysfunctional psycho-social responses to imagining the future, and this can manifest in resistance to the method or facilitators (Burt & van der Heijden, 2003; Voros, 2003). This frustration or anger is not “wrong” and is only dysfunctional when it continues for an extended period of time without being resolved (Hodgkinson & Wright, 2002).

Other core components of the method include the rapport between participants (Davies & Brumlik, 2008), enabling robust debate about strategy (strategic conversation) (Antonacopoulou & Gabriel, 2001; Schwartz, 2009; Wack, 1985). As well as “deep listening,” a practice that requires practitioners to identify the hopes and concerns of central organisational figures, also features (Wilkinson & Kupers, 2014). A willingness to be open to considering the future differently (Burt et al., 2017), and a well-clarified relationship between facilitators and the client organisation also has a key role in meeting the needs of an organisation (Rowland & Spaniol, 2017).

There remains much potential to learn from and learn about scenario planning’s ability to optimally challenge people cognitively in the workplace. Scenario planning has much potential to understand this phenomenon because the successful reports about shifts in consciousness are lasting and influential. Other performance benefits include increased decision making and emotional regulation (Schacter, Benoit & Szpunar, 2017). Understanding the concurrent social and psychological components of the practice, as well as ascertaining an optimal space and conditions for future-orientated knowledge to emerge can inform the needs of this current generation. This becomes increasingly important as the method grows in popularity and is increasingly embedded into mainstream strategic planning practice.

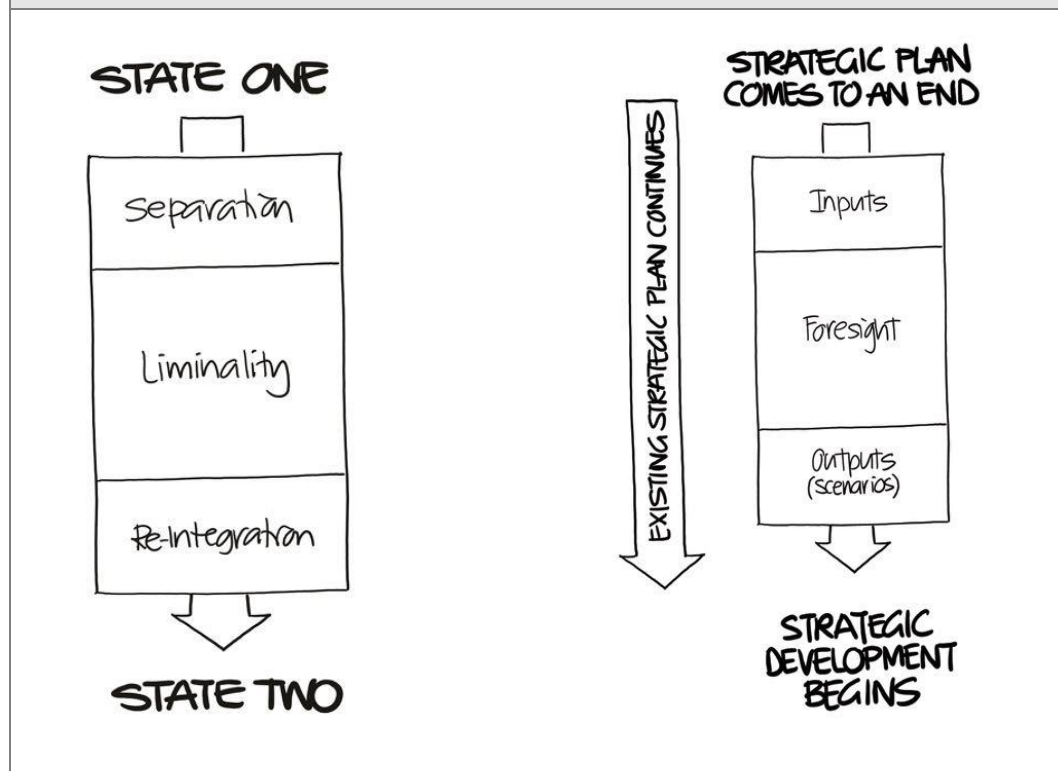
4.2 Consolidating the Liminal and Scenario

Planning Frameworks

The principal similarity between liminal and scenario planning frameworks is situated in the foresight and liminal phase. This middle phase allows people distance from their everyday work lives and enables them to think in creative and unique ways (Mackay & McKiernan, 2018; O'Brien, 2004). Foresight is participation-intensive and involves a variety of perspectives, the need to navigate tension and enquiring about the future, by separating oneself from the present (Andreescu et al., 2013). Foresight is approached in a holistic manner whereby people to engage in a variety of potential futures, without disregarding 'outrageous' possibilities immediately (Bishop & Strong, 2010).

The figure below presents a visual reference to depict how the phases overlap. The futures framework used is adapted from Voros (2003) work on foresight transitions.

Figure 3: A LIMINAL PHASE TRANSITION ALONGSIDE A SCENARIO DEVELOPMENT PHASE TRANSITION



Source: Adapted from van Gennep (1909[1960]) and Turner (1969) and "The Scenario Process" (Voros, 2003, p.14).

The scenario planning frameworks are now introduced below in 'Table 4: Scenario planning phase transitions'. These are best read alongside the liminal framework. A visual representation is presented above and was introduced in 'chapter two: section 2.2: the phases of liminal transition.' This discursive foresight practice challenges participants to use a level of cognitive versatility that draws on creativity outside of typical decision-making approaches (Schoemaker, 1991). The transition from existing strategy through foresight and finishing with implementation is found in a number of different representations. These are presented below in Table 4 and can have anywhere from three to six distinct phases

Table 4: SCENARIO PLANNING PHASE TRANSITIONS		
Authors / Theory Name	Phases	Description
Horton (1999) Scenario Planning: Complete Process (Godet, 2000) The Foresight Framework (Voros, 2003) Influenced by Mintzberg's (1994) distinction between strategic thinking and strategic planning and Horton's (1999) theory (above). Relationships Among Organisational Scanning, Interpretation, and Learning Adapted by Rohrbeck and colleagues (2015), drawing from Daft and Weick's (1984).	Inputs Foresight Output	<ul style="list-style-type: none"> ➤ Strategic intelligence (data collection) ➤ Foresight work <i>Inflections:</i> <ul style="list-style-type: none"> • Translating information into understanding • Interpretation <ul style="list-style-type: none"> ➤ Outputs: expanded perceptions of strategic options
	Anticipation Decision Action	<ul style="list-style-type: none"> ➤ Problem formulation A collective practice and open-minded thinktank ➤ Evaluation of strategic options Consultation and consensus with executives. ➤ Implementation
	Insight Foresight Outputs Strategy	<ul style="list-style-type: none"> ➤ Strategic Intelligence <i>Inflections:</i> <ul style="list-style-type: none"> • Analysis: (what seems to be happening?) • Interpretation: (what's really happening?) • Prospection: (what could happen?) <ul style="list-style-type: none"> ➤ Expanded perceptions of strategic options ➤ Strategic development / Strategic planning
	Scanning Interpretation Learning	<ul style="list-style-type: none"> ➤ Data collection ➤ Giving data meaning ➤ Action taken

Source: Author Compilation

Access to the future through the foresight 'space' is both a mental, physical and a metaphorical separation. Tools, practices and signals guide people to engage outside their usual mode of operating. Understanding this middle period helps to

challenge existing mental models and to draw on knowledge in a new way (Meyer & Land, 2005). Separation accelerates collaboration, co-presencing enables people to formulate (new) knowledge.

Horton (1999) represents this as a group experience moving from data input, on to foresight and finally through to learning outputs that expand perceptions of strategic possibilities. Voros (2003) magnifies the intermediary foresight phase and adds a fourth 'strategy' phase, distinguishing the practice of strategic development from the earlier scenario development. Rohrbeck and colleagues (2015) also present robust scenario development as commencing with a data scanning stage after which participants interpret the collected data. Like Godet's framework, the process ends with a learning phase wherein action is taken by the participants.

Godet (2000), in contrast, views scenario development as beginning with the search for direction. Godet, positions scenario development as beginning with an anticipation stage where organisations first formulate the problems to tackle. A participatory phase then begins in which strategic options are evaluated. The process then concludes with 'action,' that represents the implementation of insights.

Interdisciplinary scholarship has also mapped the psycho-social phase transitions for participants creating future-orientated knowledge. 'Table 5: Psycho-social phase transitions' is presented below and emphasises the psycho-social context.

Table 5: PSYCHO-SOCIAL PHASE TRANSITIONS

Authors / Theory Name	Phases	Description
The U Process, Field Structure of Attention. (Individual and Group) Scharmer (2009)	Co-Sensing	➤ The initial act of tuning into the relevant contexts / information and removing oneself from the system to be able to critically sense the mechanisms of the system <i>Inflections:</i> <ul style="list-style-type: none"> • Suspending • Redirecting • Letting go of mental models
	Co-Presencing	➤ Connecting to sources of inspiration and stillness. <i>Inflections:</i> <ul style="list-style-type: none"> • Future-orientated knowledge arises
	Co-Creating	➤ Exploring the future through doing-in-action. <i>Inflections:</i> <ul style="list-style-type: none"> • Enacting • Embodying • Different types of knowledge (traditional, mainstream, innovative and out of the box arises)
Transition and management for organizational and societal systems Wiek, Binder, & Scholz (2006, p.742) drew from Rotmans, Kemp, and van Asslet (2001)	Pre-transitional	➤ Relatively stable system. Micro-dynamic changes leads to a need for change.
	Acceleration	➤ Take-off Earlier fundamental beliefs begin to change, gradually increasing in scope and rate of change.
	Stabilisation	➤ Turning Incremental decrease in intensity
	Post-Transitional	➤ Terminal The system becomes relatively stable and returns to making micro-dynamic changes

Source: Author Compilation

Scharmer (2009) characterises knowledge creation through a group attunement process. Participants let go of their mental models in a phase labelled co-sensing. They then strive to open themselves up to developing future knowledge through co-presencing, before a co-creation stage in which they act to model the identified futures.

Wiek, Binder and Scholz (2006) describe the phased process from a systematic perspective through the use of a transition management model. The authors view the scenario process as a systematic journey that moves participants through different milestones. The four-phased framework moves from a pre-transitional point of stability through to a mid-point of acceleration in which the participant begins to challenge their assumptions. People eventually reach a turning point after which stabilisation is possible, and they can solidify new knowledge. The post-transitional stage encourages an overall acceptance of any knowledge that has been developed during the experience where stabilisation takes place after multiple scenarios have been developed (Wiek et al., 2006).

4.3 Similarities: Liminality and Scenario Planning

Asides from the transitional similarities, discourse analysis across the two literatures identified four thematic characteristics commonly cited within the scenario planning and liminality literature. These four themes are grouped into summary categories, 'Table 6: Convergence of liminal characteristics in scenario planning'. The themes: 1) challenge; 2) paradox; 3) social drama; and, 4) communitas. All factors will arise during any scenario planning or liminal project, are non-linear and will be revisited in different forms (Thomassen, 2014).

Table 6: CONVERGENCE OF LIMINAL CHARACTERISTICS IN SCENARIO PLANNING

Challenge	Paradox	Social Drama	Communitas
<i>Triggering change; inspiring change; overcoming challenge; knowledge uncertainty; cognitive challenge; emotional challenge; physical challenge.</i>	<i>raw and vulnerable; potentiality; betwixt-and-between; turbulence and stillness.</i>	<i>Shadow; social drama; ongoing conflict.</i>	<i>Co-Presencing; collective patterning.</i>

Source: Author Analysis

Further information about each attribute is expanded in the following sub-sections.

4.3.1 Challenge: Triggering and Inspiring Change

Different aspects of challenge occur in all liminal and scenario planning domains and helps people to create lasting change. The severity of a challenge differs depending on the context. The most commonly referenced challenge in the liminal literature is a coming of age rite of passage. Through ceremony, young boys are challenged to confront their mortality as they become recognised as a man, rather than a boy (Rubinsten, 2013).

Contemporary challenges are usually cognitive, physical or emotional trials (Meyer & Land, 2005; Myerhoff, 1975). For example, business environments challenge people, but does not typically position someone beyond their capacity (Junker, 2013). This form of challenge is not typically dangerous, life-threatening or all-encompassing as traditional ceremonial rites of passage (Northcote, 2006), but rather "...notions of marginal danger" (Varley 2011, p.85). Individuals will often instigate and monitor their own growth (DeHart, 2008). In these instances, people yearn for change or their current way of life becomes insurmountable (Pack, 2009). Personal development, self-directed learning and further education are ways that people use to accomplish this feat (Kelan & Dunkley Jones, 2009; Meyer & Land,

2005). Organisational challenges are often foreseen, and people receive warning, as with a change management project (Howard-Grenville et al., 2011).

Scenario planning is a practice that intentionally challenges people's latent beliefs about the future (Chermack, van der Merwe & Lynham, 2007). Rather than the linear and mechanistic thinking that is common for those in the business sphere, the method works with the "artistic parts of the brain" (MacKay & McKiernan, 2010, p.277). The intention is that people are challenged in an achievable way that is designed just beyond an individual's current emotional, physical or psychological boundaries, with the goal to inspire lasting change beyond their perceived capabilities.

Unintended challenges are likely to occur in any project and integral parts of the process, such as robust debate, making people extremely uncomfortable and potentially unable to progress (Hodgkinson & Wright, 2002; Rowland & Spaniol, 2017). People deal with challenges in different ways and have divergences in individual capacity to complete activities and tasks (Rattray, 2016). For example, some people will find personal disclosure in corporate settings are also challenging and others will welcome such discussions (Ward, 2008). The benefit of difficult conversations is that they highlight areas of misalignment within an organisation (Tyler, 2006). This is particularly salient if a person resisting a process is especially influential and unable to relinquish control of their vision of the future.

4.3.2 *Paradox*

Paradox is an inherent element of liminality and scenario planning. Liminal spaces in most instances are created to purposefully work with different information, paradox and contrasting ideas to find a new way forward. The

symbolism that is *both* this and *that* is prevalent within liminality (Turner, 1977, p.37). The middle of a liminal phase serves the “...forces of disorder at the service of order” (Turner, 1969, p.93). In other words, paradox is the characteristic helping to bring any hidden discordance to the surface (Tyler, 2006). It also helps people and ideas to “elude or slip through the network of classifications that normally locate states and positions in cultural space” (Turner, 1969, p.95).

Scenario planning is a technique designed to help organisations actively use and consider paradox, rather than avoid it. Modern organisations are continually grappling with paradoxical ideas and demands with many multi-disciplinary truths in one space (Burt et al., 2017; Hagel et al., 2016a; Lewis, 2000). The ability to hold paradoxical ideas in their minds (cognitive versatility) assists people to operate in modern contexts (Burt et al., 2017; Smith & Lewis, 2011). Since scenarios were used in military simulation, people have used the technique to consider multiple future outcomes. Different circumstances and situations can be considered, both within and outside of the status quo and enables genuine debate (van der Merwe et al., 2007).

There are barriers to using paradox productively. When paradox is left unacknowledged this can limit an organisation’s ability to engage with the unknown future (Czarniawska & Mazza, 2003; Morgan, 2006). Alternatively, navigating uncertainty allows people to question their ideologies and move them towards a deeper sense of a future self (Turnbull, 1991; York, 2001). Any silenced or unprocessed darker emotions arise can be confronting and destabilising to an organisation and cause social drama (Tyler, 2006).

4.3.3 *Emotion (Affect)*

Woven throughout the different components of liminality is the ever presence of emotion. Irving, Wright and Hibbert (2019) found that regret was a

motivator for students to truly embed new learning into their practice. Students reported emotive response surrounding components, such as “‘flawed discussions’ and ‘incorrect decisions’” (Irving et al., 2019, p.11). This is an important component for practices like scenario planning where the future is discussed with people who genuinely want to create change.

Participants are not always well prepared for the emotional challenges (Clouder, 2005). The potential for change also opens people up to manipulation or “intellectual blackmail” (Szakolczai, 2015, p.35). Suspicion and apathy can also be magnified when people are asked to disclose their views in an organisation that does not acknowledge the responses (Chiaburu, Peng, Oh, Banks & Lomeli, 2013). Employees may become suspicious of any future change (Kudo, Sakuda & Tsuru, 2016). People may begin to gossip, and a workplace may feel unhealthy (Tyler, 2006).

Emotion and disagreement can have a powerful impact on those present. Active engagement with shadow aspects helps mature groups to overcome conflict (Cohen, 1985). Collins (2005, p.491) speaks about his experience observing the facilitation of some difficult topics:

I was impressed by his ability to take the comments made by participants and draw them into the discussion in a way that allowed everyone to admit the fallibility and brokenness of their respective product development processes without feeling ashamed.

In this instance, emotion serves a functional purpose and helps to move people to relate to each other (e.g. *communitas*) (Tuden, 2009; Turner, 1974).

4.3.4 *Social Drama*

The abstract cultural domains where paradigms are formulated, established and come into conflict. Such paradigms consist of sets of “rules” from which many kinds of sequences of social action may be generated but which further specify what sequences must be excluded... “Social dramas” represent the phased process of their contestation (Turner, 1974, p.17).

Social drama is a term used in the liminal literature to indicate discordant group dynamics. Unexpressed shadow results in “... public episodes of tensional irruption” (Turner, 1974, p.33). Most people rarely seek social drama, yet when shadowy liminal forces do arise, they highlight organisational barriers that are not usually addressed (Tyler, 2006). Although tensional outbursts resulting from a lack of preparedness can be destabilising to a project (Wright & Cairns, 2011). The hope is that the organisation or group is solid enough to reach eventual cohesion and integration (Barnard, 1985).

Scenario planning documents interactions that could be described as ‘social drama’ or conflict (Ratcliffe, 2002; Turner, 1969).³⁴ Asides from the method itself intentionally creates turbulence (van der Heijden et al., 2002),³⁵ social drama can emerge during strategic conversations when grievances or frictions are revealed in open forums. Strategic conversation is seen as a tool to restructure people’s cognitive assumptions or blindspots (Chen & Lee, 2003).

There are two sides to engaging in strategic conversation. Active and purposeful engagement with social drama can help mature groups achieve their

³⁴ Kahn’s (2001, p.274) “collective defence mechanisms,” whereby “collective anxiety” (p.271) erupts in anger, frustration or conflict has many similarities to social drama and schism.

³⁵ Researcher emphasis. Liminal spaces are inherently provocative although a facilitator does not always activate this state.

goals but others will view the associated risks as a profound disincentive. Conflict varies in severity and cause (Wright, van der Heijden, Burt, Bradfield & Cairns, 2008), and disagreement impacts people differently (Voros, 2003). Tyler (2006, pp.115-116) expresses how a facilitator may feel in an environment where social drama is apparent:

To the organizational practitioner, lifting these liminal stories up for public consumption may feel risky, since they can expose the gap between the organization's espoused theory and its theory-in-use. But the greater risk may lie in not selecting them or inclusion in the strategic storytelling process. In telling only the positive stories, there is danger that storytelling can become a tool for propaganda, for persuasion and manipulation.

It remains that significant change arises from significant challenge. The preliminary indications are that diving into any tumultuous space where paradox and challenge is salient can be a gateway to significant change.

4.3.5 *Communitas*

Communitas describes the unique and temporary collective patterning that appears to arise spontaneously from liminal spaces (Turner, 2012). Communitas in a liminal context was introduced in 'chapter two, section 2.2.2.1: Liminality in groups.' This section describes the group phenomena in relationship to scenario planning and seeking alternative visions of the future. Scenario planning relies on this collective function to create new knowledge and communitas-like experiences are an incentive for people to develop a plan, embody and implement any insights they have had in earlier phases of liminality (Csikszentmihalyi, 1996).

A positive group experience can play a functional role in creating future-orientated knowledge. Moments of group flow in a project feel transformational,

especially when people are on the same page and work together towards a joint future (Cohen, 1985; Meyer & Land, 2005). These temporary group flow experiences are often described in metaphor because they fall outside our typical understandings of group work³⁶ and there remains much potential to understand this phenomenon.³⁷ For Csikszentmihalyi (1975; 2008[1991]), group flow is a highly refined mental state (Hagel et al., 2016a; Mainemelis, 2001). The feeling of interconnectedness and liberation amongst one's peers can help broaden one's competence and understanding of themselves. Csikszentmihalyi (2008[1991], p.74) views this as arising from "...previously undreamed-of states of consciousness."

The collective potency and possibility of *communitas* is palpable. While the descriptions are ephemeral, to anyone who has become lost in one of these moments, the full absorption in action and understanding that allows people to operate beyond their usual capacity (Hooker & Csikszentmihalyi, 2003; Turner, 2012).

Another key attribute of *communitas* is the temporary equalisation of power that results in a sense of role equalisation. (Ashforth, 2001; Cohen, 1985; Letkemann, 2002; Rohr, 2002).³⁸ During this time people are connected to the group's consciousness over their individual needs (Mainemelis, 2001).³⁹ Any of

³⁶ Schneider (2017, p.103) describes a *communitas* as a "...perception of vastness that cannot be assimilated but can be accommodated, or as the experience of humility and wonder—adventure—toward living."

³⁷ Scharmer (2009, p.70) argues that the knowledge people access during this state is "not yet embodied" and is only accessible when people become open-minded towards the collective consciousness.

³⁸ This differs from the assumption that liminars are floating in undefined space and positions negotiation as an essential part of healthy liminal experiences (Ashforth, 2001; Cohen, 1985).

³⁹ The group as a whole is "...simultaneously transforming and being transformed by the learner as he or she moves through it" (Meyer & Land, 2005, p.380).

the aforementioned challenges seem meaningless amidst this temporal nature of collective flow (Jencson, 2001; Turner, 2012).⁴⁰

Different leaders will respond differently to group flow experiences. Turner (1982, p.27) views that for leaders *communitas* "...liberates them from structural obligations," because it allows a "...a merging of action and awareness, an ego-less state that is its own reward" (Turner (1977, p.51). For others devolving power can feel vulnerable and uncertain. Cunha and colleagues (2010, pp.189-190) highlight that leaders can:

... feel trapped without knowing what to do; the lack of awareness of liminality and liminal states diminishes their capacity for leading ethically in these paradoxical conditions...

Together these liminal characteristics provide a key to understanding common liminal experiences. They mirror Turner's (1982, p.44) view that "...the liberation of human capacities of cognition, affect, volition, creativity, etc., from the normative constraints incumbent upon occupying a sequence of social statuses." In other words, creating a new future requires some element of dismantling the way one assumes the future will be.

Gaps remain to understanding precisely how people move through this creative phase. It appears that cognitive shifts are more impactful in a group when emotion, drama and comradery amplified. The interrelationship of intense concentration, heightened experience and a deepening into the creative experience influences both the individual and the environment.

⁴⁰ As a distinct relational concept, *communitas* is distinguished from the concept of 'community' in the temporary nature. Although the potential to develop into an ongoing relational capacity exists, the state of *communitas* is unlikely to continue (Beavitt, 2012). Indications are that this can be leveraged for the future.

Together these characteristics of challenge, paradox, emotion, social drama and *communitas* are interrelated. Each component is both a tool and a hindrance to the successful completion of a project. At this point, it remains unclear if the typical facilitation tactics and frameworks support liminal transition and the creation of new knowledge. Uncertainty exists about the precise confluence of facilitation, challenge, paradox, emotion and *communitas* that best to elicit new knowledge. As well as these overlaps in participant transition through liminal space and scenario planning frameworks, a number of contrasts also exist.

4.4 Divergences: Scenario Planning and Liminality

This section presents the distinctions between liminality and scenario planning. These differences are predominantly found at the research paradigm level. The epistemology adopted influences the choices made as well as influencing the assumptions about the future (Inayatullah, 1990; Romme, 2003). These differences between the two fields were initially a barrier to consolidating the two theories.

4.4.1 *Research Approach and Direction*

Liminal research is currently at cross-roads and moving closer towards considering the practical implications of liminal theory (Irving et al., 2019). The anthropological origins and norms continue to influence emerging liminal research. The liminal researcher is mostly positioned as a reflective observer describing transition as a removed bystander. Considerations of how people can learn from the space, what competences are required, or how to best support participants once they enter a liminal transition is rare (although growing). Although many different disciplines are contributing new findings specific to their context and needs (Söderlund & Borg, 2018), overall the body of work is theoretical and has a removed approach to

those being studied.

In contrast, scenario planning research has largely focused on real-life companies and their management needs, with little consideration of theory. As an intuitive and practical method, the scholarly approach has leant towards validating and refining the method (Wilson, 2000). Scenario planning has been practiced in a range of arenas including anthropology (Heemskerk, 2003). Yet it is the continued presence of global corporations like Royal Dutch Shell in futures scholarship that has ascertained the interrelationship between theory and management needs. This agenda has meant scenario planning is well-established in mainstream strategic planning practice (Wilkinson & Kupers, 2013).

4.4.2 *Discourse and Tone*

The terminology found in the liminal and scenario planning literature also has key differences. Liminal discourse tends to adopt an ineffable tone that does not commonly feature in business literature. Terms like “otherworldly” or “ritual” are common (Desing, 2013). Turner’s scholarly, poetic and whimsical tone differs greatly from organisational narrative that leans towards a lexicon of efficiency, aiming to speedily capitalise on emerging technologies and trends (Lucas & Goh, 2009).

Business scholarship draws on terms like “the next big thing” to heighten people’s engagement. Organisational theory can adopt an immediate language that insinuates they must be responsive to change (Hagel, Seely Brown, de Maar & Wooll, 2016b).⁴¹ Other terms, “robust” (Peterson et al., 2003), and “reliable” (Goodwin & Wright, 2001), seem to emphasise the scenario planning validation agenda and supports the development and refinement of the scenario method (Aligica,

⁴¹ Research on businesses operating for more than 100-years who consistently report making value-based decisions and practicing discernment, rather than reacting rapidly to trends (de Gues, 1997; Koironen, 2002).

2005; Bradfield et al., 2005; Chermack, 2011; Wilson, 2000). The way participants are discussed in scenario planning also differs from the liminal terminology and rather than undergoing a significant shift, people are positioned as “manageable”, “coercible”, and “encourageable” (Wiek et al., 2006). Neither field innately positions participants as autonomous.

4.4.3 *The Presence of Facilitators*

Another key point of difference is how facilitators are positioned in liminality and scenario planning discussions. The role of the facilitator is relatively absent within contemporary liminal research (Burns, 2012; Rutherford & Pickup, 2015; Hawkins & Edwards, 2015). When a non-liminal is discussed in an anthropological context, they are situated as one practicing “...complete authority” with liminars entering “...complete submission” (Turner, 1967, p.99). This description is problematic in many modern contexts and negates a practice of reflexivity. The key difference in this description is in empowering people in “forging a learning community” rather than “doing something to” people (Kisfalvi & Oliver, 2015, p.715). Despite being a valuable role, the responsibilities of facilitators rarely feature in the liminal literature, unless people are being critiqued for being caught up in the charisma of leaders. In other words, the potential for change also opens people up to manipulation or “intellectual blackmail” (Szakolczai, 2015, p.35).

Scenario planning facilitators are prominent as the authors and consumers of scenario planning literature (Bradfield et al., 2005; Varum & Melo, 2010). In this manner, the role of facilitators involves guiding the scenario process and is well established. However, an underlying tone in organisational studies is to focus on “risk-management” and ensuring success in projects. This need for certainty is equally disempowering to group and individual growth. Facilitators who are fluent and agile

across methodological and relational spheres can elicit tangible and actionable outcomes (Galer & van der Heijden, 1992; Schön, 1987; van der Heijden et al., 2002).

From a sociological perspective, scenario planning accounts offer a largely unexamined body of textual and experiential data from expert facilitators addressing how they both mitigate for risk and encourage vulnerability. For example, Peter Senge, a scenario planning practitioner, describes his experience as with a workshop participant:

... it was as if a rope simply became untied and broke apart. I knew intuitively that what had been holding him and so many others prisoners of the past was breaking (Senge et al., 2004, p.2).⁴²

This account and many others describe the lived experiences of many people in organisations in current day who are being asked to think, act and operate far beyond linearity. It also highlights the missing opportunity to learn from facilitators who are building their competence and skillsets.

4.5 Scenario Planning as a Liminal Transition

As chapter four draws to a close, it is important to articulate that neither field is perfect. Returning to the research focus of considering liminal research within a practice-orientated context, an epistemological shift is called for. van Gennep's liminal framework was never intended to be a designed liminality framework and is best suited to the study of other people's cultures and sub-cultures, rather than for influence or learning within our own context (Schechner & Appel, 1991).

⁴² Futures thinking has reverberations beyond organisational scenario planning practitioners contributing and advancing organisational discussion in multiple areas (e.g. de Gues, 1997; Senge et al., 2004).

Given facilitators play a core role in learning spaces, the competences required to guide transition are surprisingly absent within the liminal literature. Such research may have been avoided because it touches on a host of other debates taking place within the liminal and threshold concepts. One key point that continues to arise is what is 'real' liminality and what is 'artificial' (Bell, 2003; Thomassen, 2015). Longstanding views about spaces with "...a sort of quality-assured safety net" not being liminal are prevalent (Varley, 2011, p.85). These debates take away from the greater potential of liminal theory to address the needs of our society in this current organisational zeitgeist. Liminal competences are required more than ever in a future that is being situated as fast, uncertain and ever-changing (Ito & Howe, 2016).

Alternatively, a facilitator's holistic psycho-social competences are not explicitly addressed within scenario planning literature. This skillset can be undervalued or addressed in a haphazard manner (Lewis, 2008; Schön, 1983). This has practical implications with many leaders suggesting that their most important skills are social and that these were gathered in an ad hoc and experiential manner, rather than through specific guidance (Donovan, 2018; Schön, 1983).

It is also rare for facilitator/authors to examine their own dominant mental models. Considerations of how facilitator's own assumptions influence a project is rare. Instead, the literature highlights participant's blind spots. Exceptions exist, for example Van der Heijden and colleagues (2002, p.169) acknowledge that project failure is usually "...attributed to poor facilitation and process design" (van der Heijden et al., 2002, p.169). Hodgkinson and Clarke (2007) looks to "humanise" the strategy practice "to a deeper understanding of what lies behind the actions of strategists" (p.243). Inayatullah (1990) clarifies that how one's assumptions influence a planner's

articulation of goals and objectives and most relevant to this discussion “... the content of this articulation” (p.116). In this capacity, Schön’s (1995, p.29) statement falls here:

Perhaps there is a way of looking at problem-setting and intuitive artistry that presents these activities as describable and as susceptible to a kind of rigor that falls outside the boundaries of technical rationality.

Together, liminality and scenario planning provide the opportunity.

4.6 Chapter Summary

This chapter presented scenario planning as being well positioned well to be a prototype for designed liminality. Scenario planning and liminality are presented complementary discourses that together provide an opportunity to contribute to a wider consideration of the design and facilitation of transformative spaces. Chapter four was guided by the research questions: *‘Is scenario planning suitable to inform the practice-orientated design and facilitation of liminal spaces?’*

The scenario planning framework was considered alongside the liminal framework. Literature from both disciplines demonstrated multiple reports of participant experiences in facing challenge, paradox, emotion (affect), social drama and communitas that are always present when lasting change is pursued in a facilitated environment. Disparities were also found between liminality and scenario planning. These are largely situated in the research approach and direction, discourse and tone and the presence of facilitators’ in the research.

These differences speak to the gaps found in the liminal field and the difficulties in considering the design of liminality. The interdisciplinary consideration positions scenario planning as a real-life opportunity to inform the role of a contemporary facilitator within organisational liminal transitions. The following chapter presents the

themes and sub-themes extracted from a scenario-informed strategic planning process.

Chapter 5: The Heart of Corporate Memory

This chapter presents data collected during a scenario-informed strategic planning consultancy. The chapter is framed by the overarching question of this research is: *'What are the psycho-social foundations of a practice-based framework for liminal spaces?'* This question is considered from a sociological lens and a multi-layered presentation of the concept analysis themes and sub-themes. No one definitive factor influenced the outcomes of this project, rather, the findings support the argument of the study. A confluence of psycho-social factors was found to support this sound liminal transition. This chapter is broken into two parts, the first presented the organisation's history of ritual and the intentional setting of space, and how that influenced the project. The CEO's ability to communicate support for this project encouraged people to commit to the process. The pre-existing capacity for considering risk-taking, once such a space was established, encouraged healthy strategic conversation. Whereas, the second part made it evident that the competences and culture of the organisation inherently influenced the participants' capacity to engage within the foresight parameters.

Concept analysis identified the themes from the secondary textual data (individual participant interviews, focus groups, and a Delphi survey), that was collected before and during the foresight phase of a scenario planning project. This provided information on how the organisation viewed themselves, and the scenario-informed strategic planning process. These semi-structured interview questions resulted in stories, observations, and expertise relevant to multiple themes that is typical of verbal communication (Tracy, 2010).

The second part of the chapter focuses on the two-day scenario development workshop held on the 27-28 November 2013; and draws on the

author's ethnographic field notes. The themes from the ethnographic field notes were: 1) leadership; 2) liminal supporters: 'the pivot'; and, 3) facilitators. It was evident that the competences and culture of the organisation inherently influenced the participants' capacity to engage within the foresight parameters. In essence, the organisational culture of Services Ltd. was already primed for a liminal experience. These pre-established competences were already established within the leadership group prior to the scenario planning intervention included: 1) 'thinking'; 2); 'conversation', 3) 'decision making'; and, 4) 'reflective practice'. These components of cognitive versatility (Hodgkinson & Clarke, 2007), and openness to learning and managerial reflectiveness have been shown to support successful scenario planning project (Galer & van der Heijden, 1992). Thus, enabling participants to consider multiple futures with a healthy level of discomfort and debate. The secondary data prominently features early in the chapter and the ethnographic data features strongly in the second part; although these were cross-referenced and examined together.

The participant group was made up of leaders and managers from different Services Ltd. health care sites across Australia. Any names mentioned in this chapter are pseudonyms and not the actual names of the participants. Having cross-site expertise from different states in Australia helped cultivate cross-disciplinary discussions to inform the organisation's national 2015–2019 strategic plan. In the early stages of the project, the organisation leant towards a risk-reduction and drew on known strategic approaches (Mason, 1994). As the project progressed and the underlying purpose of scenario planning became clearer to the participant group, a transformative approach emerged (Mason, 1994). By the time of the

workshop, participants were sharing freely and had an extensive understanding of scenario planning.

5.1 Summary of Findings: Individual Interviews, Focus Groups and Delphi Surveys

Individual participant interviews, focus groups, and Delphi survey data⁴³ provided a rich and detailed perspective of the historical and ongoing organisational practices and values and identity at Services Ltd. The four themes identified from across the data sets had distinct correlations with the importance of building rapport to support the creation of new ideas.

The excerpts presented in this chapter lent themselves to an exploration of the relationship between scenario planning and liminality. The excerpts articulate an array of operations supporting the implementation of this scenario planning project. One of the former board members from the individual interviews features strongly in the selected themes and sub-theme excerpts. There was a strong cohesion across the data, and the quotes provided were mirrored in the other participants. However, these quotes have been chosen for the provision of rich articulations that were more detailed than some of the other participants. Four themes arising from the primary discourse analysis were inter-related ways of: 1) *thinking (long-term thinking)*; 2) *conversation (curating tension)*; 3) *decision-making (Calculated risk-taking)*; and 4) *reflective practice (building in times and spaces apart)*.

⁴³ The Delphi survey rounds are identified by survey one (S1) and survey two (S2) followed by the identification number of the participant response. For example, S1#1 indicates the first response from Delphi survey one.

Table 7: THEMES AND SUB-THEMES DATA SUMMARY: INTERVIEW, FOCUS GROUP AND DELPHI SURVEY			
Thinking	Conversation	Decision-Making	Reflective Practice
Long-Term Thinking	Curating Tension	Calculated Risk-Taking	Building in Times and Spaces Apart
<i>Risk-taking; corporate memory; history, foundations, long-term thinking and readiness for change.</i>	<i>Tension; respect; deep listening; change; core values (story and brand)</i>	<i>Risk-taking; learning from history; discernment, foundation-building; stewardship</i>	<i>Time apart, symbols; space; pilgrimage; organisational processes; and reflection.</i>
Readiness for Change	Openness to Change	Thinking about change	Reflection in Action

Source: Author concept analysis.

5.1.1 *Thinking: “I don’t experience anywhere else”*

The theme ‘*thinking (long-term thinking)*’ denoted an active practice of considering a future beyond one’s personal lifespan and the ability to invite versatility into conversation. The sub-themes were: *Risk-taking, corporate memory, history, foundations, long-term thinking and readiness for change*. Indeed, at Services Ltd. an evidence-based medically trained mindset featured prominently in the individual interviews, focus groups and workshop data. Yet, woven throughout the discourse was an awareness that decision making has multiple possible outcomes, with differences in opinions requiring consideration (even if it was not always acted upon). This was combined with a unique characteristic of being able to readily draw on nearly 100 years of corporate memory, as will become evident.⁴⁴

All participants held a breadth of experience and the organisation had a pre-existing practice of planning beyond the usual three to five-year strategic planning

⁴⁴ Organisations who have been in operation for more than 100 years tend to plan for more than the usual three to five years planning cycle. This requires a high level of competence in transactional and holistic thinking (Casile, Hoover & O’Neil, 2011; de Geus, 1997).

parameters. This meant that participants were familiar with using scenario thinking, despite not having engaged in the method previously. Historical stories of successes resulting from risk-taking were embedded into the organisational narrative and a Board member described:

*...we're dealing with long term thinking in a way that I don't experience anywhere else in any of the businesses I've dealt with (Board Member, Focus Group Two).*⁴⁵

Participants demonstrated through an acute sense of responsibility towards the organisation. High levels of analytical consideration, reflective practice and professional knowledge translated into a high level of readiness for change; a key indicator of the organisational culture and likely contributor to project success (Burt et al., 2017; Burt & van der Heijden, 2003). A sense of personal and professional responsibility was present, evident in the following participant response:

*... if we touch more people and influence them positively then that is a great thing, if we provide very high quality [services] with respect, that is a great thing. But if there is a tension about the business model versus the core business? **I can leave now***⁴⁶ (Board Member, Focus Group Three).

Overall, participants showed a willingness to engage with the project and openness to change, reflected in the questions asked of the facilitation team. Not all participants provided a cohesive description of cognitive versatility, yet there

⁴⁵ An interesting topic of consideration for future research would be transgenerational approaches to strategic development, cathedral thinking and the use of legacy decisions (Antonson, 2012; Harran, 2016; Yale School of Forestry and Environmental Studies, 2012). Limited research on how longitudinal strategic decision-making is undertaken in businesses operating for 100-years or more. de Geus (1997) and Rohrbeck and Schwarz (2013) being amongst the few who have begun this process.

⁴⁶ Researcher emphasis to highlight the emotion emerging, especially during focus groups.

was a recognition of the presence of grey areas. For example, “...so at the moment there is grey areas between” and ... “It's a dynamic thing, isn't it? It's evolving” (Manager, individual participant interview, 5 September 2013). While the majority of participants recognised the importance of considering different types of thinking, this presented difficulties for others:

To be inclusive of the lateral thinker, I think that's a bit of a challenge for all of those who are very efficient... A lot of [the leadership team] are very organisationally conscious and that's very logical and if we want to get there we have to do this, this and this. That's very logical. What capacity is there for the left field and the out of the ordinary (Former board member, individual participant interview, 25 September 2013).

A strong organisational consciousness and corporate memory were present across all areas of analysis. The advisory board in particular demonstrated a sense of responsibility to ensure the organisation continued to be successful into the future:

We said this is a new story, it's a new entity, a new story. While it has its roots... it has to develop its own story and take some pride [that] it is own story because there is a great story developing... It's a new story and I see that they'll have to learn to sail alone. They can't keep looking back to the mother ship. They have to go beyond that horizon somehow (Former board member, individual participant interview).

References to organisational heritage were salient throughout *all* data sets:

[Services Ltd.'s] rich and wonderful heritage would have to be without doubt a key strength and provides reminders of such humble beginnings and demonstrates what can be achieved with strong leadership and vision (Operations manager, Delphi S1#51).

The Delphi survey responses from site managers differed in the perception of cognitive versatility held by the management team in relation to day-to-day operations. Responses indicated that a higher capacity for risk would empower staff on the ground.

I think there needs to be an acceptance for variation in skill base, expertise and management style. Having senior or executive teams that support and nurture innovation is pivotal. If the exec team wants to ensure what is put on the table is only what they would do themselves, it will stifle growth and innovation. With this philosophy, the team will only ever be as effective as the leader is (Operations manager, Delphi S2#43).

This perspective of organisational identity lent itself to conversation and was discussed in relation to the benefit from taking risk for potential dividends in the future.

The data contained a variety of stories about how the founders had drawn on divergent thinking. This was recognised to be a messy process and necessary process. This was not accepted by all and many participants wanted to know the best course of action even before we had examined any future-orientated data.

George Bernard Shaw said reasonable people can make the world fit into what they want, it's the unreasonable who bring about change. How many unreasonable people have we got and do we ship them out if they don't perform? That's always a risk I think when you're too efficient. I don't know how you evaluate that or get a scope on it, I just don't know, but it's a question... (Former board member, individual participant interview).

Navigating between these different ways of thinking fed well into the aims of the

scenario planning method as participants were pre-prepared to consult widely. Group thinking was attuned to being able to plan for a longer period while also using a more immediate transactional mindset of thinking. It is proposed that such cognitive versatility is a core liminal competence and necessitates further analysis in future studies.

5.1.2 *Conversation: “talk about the things that matter”*

The theme of ‘*conversation (curating tension)*’ was a core competence demonstrated by participants. Overall, the focus group and scenario development participants demonstrated an ability to discuss and withstand differing views about the organisation’s future. This did require the navigation of turbulence and this was apparent in the secondary data and scenario development workshop. The sub-themes of *tension; respect; deep listening; change; core values (story and brand)* informed the conversations that arose.

The ability to have important conversations is an essential component to using the scenario planning method (van der Heijden et al., 2002; van der Merwe et al., 2007); and an integral part of liminal navigation (Borg & Söderlund, 2014; Turner, 1977). Tension was demonstrated by participants in the focus groups and strong discussions in the early phase of this project which exposed a number of latent frictions.⁴⁷ This largely centred on the different attitudes about how to include the organisational values into everyday operations. The chairman of the executive board took the initiative at the opening of the scenario development workshop and explicitly spoke to core tensions identified from the earlier focus groups.

Tension was apparent around how best to implement a sound business

⁴⁷ The use of the term ‘tension’ and ‘friction’ is not a reflection on the organisation. It does highlight that liminal space was present and the need for competence of individual participants and facilitators alike when having emotive discussions in a productive manner.

strategy while keeping to the organisational values. The chairman opened the workshop requesting that for the purpose of the day, people “...*place the current values to the side and be assured that those will be discussed later and incorporated into strategy*” (Ethnographic notes, day one). Such a statement acknowledged the importance of concerns that had been expressed in the earlier ‘deep listening’ data collection phase (Wilkinson & Kupers, 2013); and also clarified the strategic future being considered in that time/space.

When the scenario-informed strategic planning project was commissioned Services Ltd. had already made some significant strategic decisions that were in the process of being implemented and were considered a calculated risk for the organisation.

I’m very confident we’ll be able to handle it, but I guess a lot of things will come out that we haven’t thought about, we’ll have bad experiences, but it’s a big one for us (Board member, focus group two).

As outlined in the previous theme ‘thinking’ pre-existing values and long-term thinking were already embedded into organisational practice. For example, one staff member shared: “*I have never seen an organisation’s values so strongly followed in any other organisation I have worked in*” (Manager, S2#27). The following comment demonstrated the prominence of this:

...we keep mentioning the word heritage, before that point and after that point, the heritage seems to me like an integral part of the culture and this has influenced the professional management (Board member, focus group two).

However, different opinions did exist on how best to weave organisational values into the corporate imperatives. A focus group shared:

I feel a constant tension there... [between services and purpose] ...

When we make expansion, commercialisation, competitiveness in the market place, ruthlessness in how we look after our people, a priority over the other then I think we run the risk of becoming whatever else, our point of distinction will be lost and the relationships with our staff...

(Board member, focus group three).

The majority of participants interpreted having strong core values as a strength that improved business outcomes: *“I believe this gives us a softer internal culture ... the benefits of which are passed on to our clients...”* (Delphi S1#101).

There was a sense that purposeful business is *“very good business... because it’s transforming changes individual’s behaviours”* (Board member, focus group one).

When asked why maintaining corporate memory⁴⁸ was so essential, one focus group participant responded: *“I probably hang onto that as some last short gasp of keeping us humble enough to see what our true business is about.”*

Others were more pragmatic and viewed that the organisational values were important; but considered that these needed to monitor their impact on service delivery:

I think on all the values stuff, it’s there, its front and centre in reality, so I wouldn’t change anything there. Whether it would be effective or not is something to manage, but I wouldn’t change anything (Board member, focus group one).

⁴⁸ The term “corporate memory” comes from a participant interview a former board member as part of an individual participant interview on 25 September 2013. The use of the term in this chapter does not prescribe to a precise academic understanding (e.g. Lahaie, 2005; Van Heijst, van der Spek & Kruizinga, 1997). Rather it suggests and supports the view that this organisation recognises that its language, values, and so on that are complicit in the organisation’s core business and identity and are maintained in the minds of its staff and story.

Such a sense of responsibility can also be onerous, and some emphasised that maintaining organisational identity was “...a major challenge which we need to invest in” (Unit Manager, Delphi S1#48). Comments like this indicate the importance many placed on maintaining a coherent collective purpose, with one participant sharing her views: “[Staff], they’ll keep changing. I hope they’ll moderate each other” (Board member, individual participant interview).

Other discussions included preparing a workforce that was ready for a changing future:

If we are going to be successful in the future, we have got to look at what the future is, and to us, is that a future that is about producing people that can cope with that changing world? (Health care educator, individual participant interview).

Deep listening and respect were evidenced and participants were rarely overheard discounting outrageous ideas.

It’s just that the past is not always indicative of the future and if you look at the GFC [Global Financial Crisis] and various things that are happening in our environment, it’s good to bear that in mind... (Board member, focus group two)

Responses to new ideas were thoughtful and people would cite unforeseen changes from the past, that had influenced business operations, including changes in policy or social attitudes. For example: “You’re Right. Remember when they changed that legislation overnight, overnight! We didn’t have capacity - they could easily do something like that again...” (Ethnographic notes, day one). Another participant shared: “I have never been conflicted in my head... [between business and values] they have felt very synergistic...” (Executive board, focus group three).

Overall, this ability to have difficult discussions and apply a lens of discernment lent itself to the tension that often occurs in scenario work (Burt et al., 2017).

So we constantly have to bring perspective into all the discernment decision-making we do. This is great, because that makes us distinct in some ways from other organisations (Board member, focus group one).

Symbolic language and metaphor featured throughout the discourse. For example, the previous advisor rhetorically asked the interviewer: *“How will they maintain a corporate memory of keeping the heart and the soul? It’s got its own heart too.”* Another board member shared that the organisation drew on:

... ceremonial type celebratory type things that are symbolic type things, which is a part I did not find much in a major commercial law firm (Board member, focus group one).

These excerpts demonstrate that it is possible for facilitators and leaders to have layers of dialogue within the parameters of strategic pursuit. Purposeful tension was accepted in the workshop. Issues identified in the earlier ‘deep listening’ phases of ‘project A’ allowed facilitators and key organisational members to curate the content and direct discussions during the scenario development workshop. Selected quotes from the interviews and focus groups were placed on flash cards to intentionally spark controversial discussions in this direction. From the outset these provoked a lot of discussion and individual participants were overheard discussing these from the moment they sat down at their tables.

It is proposed that much of the conversation outlined in this section is interrelated with the maintenance of the foundation story. This is discussed in more depth in the following section.

5.1.3 *Decision-Making: “You’re going to hand over your entire future”*

The theme, ‘*decision-making (calculated risk-taking)*’ demonstrated a pre-existing aptitude for considering risks and incorporating calculation and research. The sub-themes: *Risk-taking, learning from history, discernment, foundation-building, stewardship*. The history and foundations of Service Ltd. were embedded into the organisational narrative and purpose. The legacy narratives included stories of risks taken that had been influential for the organisation’s success.

The convergence of a strong history and risk-taking seemed to have significantly contributed greatly to innovative thinking:

... they [the founders] built by taking risks, by the way they’re not frightened to take risks, and with a bit of prayer, and they’d take the risks and that’s what happened (Board member, focus group two).

The organisation’s stories influenced individual people differently and there were indications that individual staff members had taken on professional identity markers as personal. Maintaining a successful business trajectory and continuing the longevity of the organisation were considered key drivers. For example:

[Previous leaders] ... laid a strong foundation and there has been excellent stewardship, keeping all eyes firmly on the ball and not resting on laurels which have paid off. Similarly, I think excellence is a value and the subsequent actions that arise from that, position us well (Board member, focus group one).

It was common to hear assertions of making decisions with both heart and relevant industry considerations.

We have been saying for years if it's only a business we'd sell it. It has to keep that part of the story alive (Former board member, individual participant interview).

More recently, some precarious decisions had been made and had included collaborative assessment. One board member spoke of witnessing the discernment which came along with this:

... [our previous CEO] brought everyone along with her. The amount of discernment which is just getting your head inside of the problem. It's a pretty big decision; you're going to hand over your entire future.... It was inspirational, certainly for me from a legal perspective (Board member, focus group one).

The Delphi cohort had split views about how innovative the organisation was. This is evidenced by one respondent describing Services Ltd. as: *"Forward Thinking and willing to take some risks..."* (Manager, Delphi S1#4). Whereas, another believed the organisation did not take many risks: *"creativity is a risk: we are too risk averse in how we apportion resourcing to allow a person to fail, learn and grow"* (Delphi S2#44). Another person wanted:

...the permission to act with confidence on behalf of the organisation - and perhaps mess up occasionally as a result, but otherwise possibly opening up new opportunities (Delphi S2#30).

The workshops and focus groups placed continued emphasis on making discerning long-term decisions that would support the organisation to last another 100-years: *"... we have this tension as to how to be so courageous and take risks"* (Board member, focus group one).

For the purposes of a scenario project, the discerning approach to risk

interacted well with the pre-existing practice of longer-term thinking during the scenario development workshop, and risk-taking is essential for liminal transitions.

5.1.4 *Reflective Practice: ‘Building in Times and Spaces Apart’*

“We must teach more by example than by word” ~ Mary of the Cross

Mackillop (Reflection notes. The Issues Workshop: 8th August 2013).

The theme *‘reflective practice (building in times and spaces apart)’* signifies Services Ltd.’s pre-established reflective practices. This fourth theme of ‘reflective practice’ supports the prior themes and increases the likelihood that people can have valuable strategic conversations. Reflective practice is represented by the sub-themes: *Time apart, symbols; space; pilgrimage; organisational processes; and reflection*. The pre-existing practices at Services Ltd. meant the participants were primed for reflection-in-action in a corporate setting serving to establish ‘normalcy’ towards these liminal practices.

Services Ltd. maintained an official policy of pausing for a reflection before a meeting and this symbolic gesture before a meeting served a number of functions. It provided a moment of pause for participants to attune to the needs of the scenario development space and signals to people that they are about to enter a new conversational space:

We have processes in relation to reflection before meeting. Value discernment as a formal policy in relation to major decision making

(Board member, focus group one).

The reflection time signalled a ‘separation’ from the norm and consisted of a philosophical contemplation and provided the facilitators and CEO the opportunity to address the tensional concerns that had arisen in earlier.

Following the chairman's reflection, the CEO begins by acknowledging the hard work done to date on the project and provides a brief update about adaptations that have occurred since the earlier "Issues Workshop" where participants were brought up to speed on issues emerging from the preliminary analysis (Ethnographic notes, day one).

Another participant considered this allowed people to actually talk about important issues.

Most of the big meetings start with a reflection for action and that's allowing ..., it's an organisation where it's okay to talk about the things that matter (Previous leadership team, current advisor).

During the reflection time, the facilitators had not yet begun officially 'holding' space and key organisational members continue to use their leadership influence (see section 5.2 for more detail).

The workshop begins with the chairman of the executive board reading a reflection for the day, as is the organisation's custom; an internal process the organisation has. There are twenty-eight participants in the room, as well as the project officer, the executive manager, the scenario writer, the project team and the project facilitator who stand in various positions around the large room surrounding the tables. This practice of reflection is familiar to the participants, and the facilitation team has become accustomed to the practice.

This moment of pause does serve to indicate a shift in the atmosphere of the room from the phone calls made earlier in the hall and reconnecting with those they had not seen for a while and grounds the purpose of the two days. The moment has an impact on me, a moment of pause, as I

am accustomed to jumping directly into a workshop and schedule.

Until this point, the CEO sits at the front right-hand side of the room. He greets others as they acknowledge him, yet not seeking anyone out as such. Following the reflection, he looks directly towards the facilitator, nods his head, and the day commences with an explanation of the scenario development workshop in play for that that day (Ethnographic notes, day one, 8.30am).

The workshop participants were already familiar with the processes required to facilitate a deepening of conversation.

Retreats were also regularly scheduled into the organisation's calendar.

Building in times and spaces apart, *they're called retreats but it's not the retreat that we understand. It's a different kind of retreat ... having room to think and time to think is something that pilgrimage allows, I don't think the working day allows too much for that at these times (Previous leadership team, current advisor).*

This first part of chapter five demonstrated that a pre-existing culture that lent itself to the emergence of liminal space, thus enabling successful scenario development outcomes. As one participant shared, Services Ltd. was already actively “*going forward in our own transformation journey*” (Department head, individual participant interview). The ethnographic notes support the view that the organisation was already primed to engage with future-orientated thinking and participants were able to respond to emerging project demands. The organisational culture and emphasis on hierarchal stewardship had primed the participants to think beyond their individual positions.

Organisational identity is already known to dictate the capacity to develop future-orientated knowledge in workshop spaces (Balogun, Huff & Johnson, 2003; Jarzabkowski, Balogun & Seidl, 2007). Each of the themes; 'thinking'; 'conversation', 'decision-making' and 'reflective practice' highlight the important role of cognitive and social dynamics in thinking of the future of a business. It is the people and their unique understanding of the future that ascertains the success of organisations, or as one participant stated:

We can't be responsible for how people manage it and how it looks in 20 years, but the people who are in, if you've got the right people, and the key appointments, key leadership roles, are so vital in any organisation, they set the tone. It may not always trickle down, but what would it look like? (Board member, focus group three).

5.2 Summary of Findings: Ethnographic Notes

This section presents the themes and associated sub-themes from the scenario development workshop, particularly the ethnographic field notes. Workshops are an essential location in scenario planning's ability to challenge people's mindsets (Hodgkinson, Whittington, Johnson & Schwarz, 2006). The scenario development workshop most closely resembled the Intuitive Logics method (Chapter two, section 2.7). The retrospective examination of this project with a liminal concept established that as well as preparing the organisation for scenario planning, the behaviours and norms assisted the navigation of a liminal transition.

The separation from the everyday into the liminal (foresight) activities was not immediate. Instead, there was a sense that people were attuning to the workshop space as they arrived. Individual participant engagement also fluctuated

at different times during the workshop. Some people always waited for instructions and others took an active role directing conversation. Many people had travelled to the workshop from other cities or interstate and spoke about being tired. On the first day, a participant who arrived late was overhead proclaiming: *“I heard he [CEO] has already made all the strategic decisions, is there any point in being here?”* Yet this same person was later found motivating and leading his team during a number of the tasks.

The following excerpt demonstrates how committed some of the participants were to the group activities.

Ethnographic notes, day one: Morning tea.

At morning tea on day one, the participants have spent the morning identifying and debating expected events. We have told the participants they can go for morning tea. About 60% of the participants get up to have morning tea. The other 40% of participants remain to finish and work on their tasks. Those who stay continue to debate the trajectory of future events, the impact of future elections, and changing technology. One group works all through morning tea, with colleagues from other tables bringing them snacks so they don't have to get up.

The following findings now turn towards observations surrounding the roles that assisted participants throughout the project. The following selected extracts are presented from the field notes are used to illustrate the themes and sub-themes.

Table 8: THEMES AND SUB-THEMES DATA SUMMARY: ETHNOGRAPHIC FIELD NOTES		
Leadership	Liminal Supporters	Facilitator
<i>Surrender; modelling; resistance.</i>	<i>Crossing boundaries; “the pivot”; avoiding jeopardizing the project.</i>	<i>Creating; curation, collaborating; detail-orientation; negotiation.</i>

Source: Author concept analysis.

5.2.1 Leadership

During the scenario development workshop, shifts in engagement began as participants began to perceive the method as being legitimate. The CEO’s ability to provide his staff with subtle cues indicating his support for the method and the facilitator that greatly influenced the space. The interview data analysis showed that much respect for the CEO was present and his decision making was respected.

Ethnographic notes, Day one: 11:00am following morning tea:

It’s day one and everyone has returned from the morning tea break, everyone has been very attentive in the morning. The main facilitator has asked each group to give feedback on the group work from the morning where they placed ‘expected events’ onto their timelines. The CEO, automatically steps up to be the first spokesperson for his group. Discussing the findings from the group process, his group shuffled and glanced at one another while he spoke. Following the CEO’s presentation, the facilitator, began to question some of the assumptions, or outcomes of the group’s findings. The questioning was done directly and succinctly. And while the manner in which the two spoke was minimal, this moment signified a shift in the room. The CEO seemed to relax his demeanour, and in that moment he acknowledged that he may

have interpreted something based on his own assumptions. He nodded his head slightly, sat down looked down at his notebook, opened it up for the first time in the day to take notes. All the other participants looked at the CEO making a note in his notepad. He glanced a confirmation to another individual from group number 3 to begin speaking.

This real-life example of the CEO getting up to speak represented a moment of role equalisation emblematic to the *communitas* concept. This moment may have been brief, but this moment was an important one and all the other individual participants were observing. The cues from key individuals, like the CEO, are important to communicate to participants that they are 'safe' to engage with the espoused values of scenario planning.

The devolution of the CEO's power was not discussed before the workshop although prior to the reported cues, participants were seen glancing at the CEO every time they went to speak. In this instance, the role equalisation occurred through subtle cues, such as the CEO nodding to the facilitator, and beginning to actively listen to the other participants. Although this interaction was observed to imbue the workshop with a different rhythm enabling people to gradually share more openly. One participant was even overheard at the end of the workshop saying was surprise: *"Did you see him [the CEO] playing like that?"* (Ethnographic notes, day two).

It is equally important to note that the CEO clearly reasserted his dominance as the second day came to an end. Many of the participants are dressed in costume and are sitting in an auditorium acting out a brief interpretation of the future scenario they have built over the two-day workshop.

Ethnographic notes, Day two: 16:45pm following scenario

enactment:

The last group has just finished acting out their scenarios in an auditorium, the final performance included the CEO's group. Following much laughter, he nods towards his executive support manager and proceeds to thank the facilitation team. The CEO pulls off his costume and steps into his role of CEO once again. He proceeds to direct those who had attended to the plans for dinner that evening, accentuating the importance of the day, and the importance of their contributions.

The excerpt emphasises the narrowing of hierarchy, supported by a strong set of project parameters. Previous research by Johnson and colleagues (2010) makes the argument that clear direction requires the leader to not take such a prominent space. These authors attributed the failure of one of their workshops to how, "...the directors backtracked on their commitments to devolve power [which made the] espoused purpose unclear" (p.1596). Both of these simple interactions, stepping back and signalling to the group that liminal 'play' time is over, is necessary to reconstitute the every-day status.

5.2.2 Liminal Supporters: 'The Pivot'

The executive support manager was an essential presence throughout the whole scenario planning process. She was a core liaison point who supported and prepared the facilitators. She was described at one point as "...the pivot in this particular strategic planning exercise" (Main facilitator, speaking on day 1 of the scenario development workshop). Consultants are reliant to some degree on internal guidance to do their best work (Schwartz, 2009). The executive support's communicated internal boundaries and emphasised the organisational direction.

The presence of a supporter also assisted the facilitation team to

understand participant demographics and the best seating arrangements and organised many of the logistical needs for the two-day workshop, such as booking rooms. In preparation for the workshop, she tactfully expressed individual participant character traits, known concerns and worries.

Tension is an expected part of scenario planning and liminal spaces and the interaction between facilitators and internal (liminal) supporter was not always smooth. At one point, the executive support manager was overheard saying: *“If we lose confidence at this point, the whole project will be jeopardized so I’d rather get it right than rush it”* (Internal communication, 15 October 2013). This clear and directive statement provides insight into the value an intermediary can play. As well as the ability to have difficult conversations at any phase of the project. through being aware of the needs of the organisation and the way the method will be received. This was undoubtedly not always smooth sailing and executive support manager said to the researcher at one point during the workshop: *“Sometimes you just have to trust the process”* (Ethnographic notes, day two), indicating the level of trust had been created in prior interactions.

The introduction of the pivot or ‘liminal supporter’ is new to the liminal concept. In this example, the executive support manager was a necessary bridge between the CEO and consultants and could be understood as one of the “... members who hold credibility within the company” (Huss & Honton, 1987, p.23). This person is not solely a participant (liminar) or a facilitator (non-liminar) but rather a fulcrum between the external consultant and the internal environment. The ability of this person to hold the project vision through the lens of both the facilitators and the participants (organisation) helped to guide the project when communication between the parties was misdirected or off-point. Having the right

people in the room, and indeed supportive people in the room assists project outcomes (Molitor, 2009; Schwartz, 2009).

5.2.3 *Facilitators*

The ability of facilitators to clarify their role and distinguish themselves from participants is essential to effectively guiding a scenario planning process. Leaders need to feel able to temporarily devolve their power and trust the method (Schwartz, 2009). This can be odd for leaders who are used to constantly being in control. To step into this temporary role, facilitators enter their own unique separation phase of the transitory process.

Facilitator engagement with a project begins before the of the majority of participants become involved. This pre-separation design phase involves behind-the-scenes preparation that supports a successful project. During this phase collaborative discussions begin between facilitators and key people from the client organisation about the design, development and enhancement of the project aims (Burt & van der Heijden, 2003). Johnson and colleagues (2010, p.1612) suggest that: “It is also clear that a good deal of the management of workshops is accomplished before or after the ritualized episode.”

In this scenario development workshop, the facilitation team was emailing late into the evening the night before, the resources were printed, confirming seating plans and clarifying the schedule. The lead facilitator was responsible for the project and facilitating the workshop. The following reflective notes are written from the current researcher’s experience as a co-facilitator.

Ethnographic notes, Day One: 27 November 2013:

I arrive at 7.30am at one of Services Ltd. locations. I have a slight feeling

of stepping into the unknown. A feeling I know well from facilitating other workshops. I know we are prepared, and we've been working on this consistently. I'm typically nervous whenever I meet new people and I am aware of all the variables that can take place when people interact with one another on a planning day. I'm a little tired from preparing the night before. In my hand, I clutch some flashcards that will be placed on the tables. They hold quotes from the interviews, and desk research aimed to raise discussion. To this point I had been present for a number of meetings with key supporters in the organisation and had primarily engaged with Services Ltd. via email, through the lead facilitator, or in front of a computer, looking through research about the organisation's performance within the sector, their competitors, awards they have won, or reviews about their services.

The workshop is being held at one of the organisation's sites so the location is familiar as I have been into this building before for meetings. Although I have never been to the conference room where we will be developing the scenarios. The room is situated at the end of a long hallway, with a foyer where tea, coffee, and breakfast foods are being set up, indicating to participants the importance of this area as space where they can relax, or take phone calls, before moving into the zone of the workshop.

Before the participants arrive, the project team meet with internal champions which includes the CEO's executive support manager, the scenario writer, the project team and the project facilitator to help to arrange four large desks, which fill the large conference room. The four

desks are set up to hold 7-8 participants, with pre-organised places for each of the participants allocated by one of the core internal project drivers. We set the tables on a slight diagonal tilt facing towards a projector at the front. Each table has a large butchers' paper, smaller notepads, pens, markers and a four-page pro-forma booklet with an outline of the scenario process, and quotes that had emerged from the interview process. Each participant also has a workbook in front of them with relevant findings from desktop, archival and scholarly research prepared to assist with this process. A timetable for the two days is also provided and everyone is guided towards their allocated tables.

The facilitator experience of transition was different from the participants and occurred outside the gaze of most participants. On later reflection, as I walk through the doors into the venue, I am personally moving from being akin to Goffman's (1959) "backstage persona" (p.40). This transition from the role of researcher and planner and becoming the 'frontstage' persona, of facilitator encourages certain public aspects of ourselves coming to the fore under the gaze of others (Goffman, 1967). This pre-separation phase experienced by facilitators is outside the awareness of individual participants. If they are aware, they only have a periphery recognition.

When viewed together, when analysed through a concept analysis lens, the data from this scenario-informed strategic planning project demonstrates the interrelationship between individuals and the organisation. the essential role that people play in organisations is an inter-dependent one. The organisation and people are reliant upon each other, but also able to exist without the other. Neither is privileged and both are equally important. One board member in focus group one said, strategy "... evolves because the context around the organisation

evolves itself.” It is people who develop strategy, yet implementation and organisational success requires a confluence of logical capacity, psycho-social factors, and most importantly the space to navigate back and forth between a variety of mindsets.

I’d start at the basis that the best strategy in the world can fail and the poor strategy can deliver huge value as long as you have a great team of implementers. So, the first question would be: Have I got the people in the team that can actually do the job? Not just in terms of implementation, but having sufficient knowledge of the industry without having the answers and be flexible and intuitive enough to make the changes when the changes need to be made. Focussing on the human capital (Board member, focus group three).

5.3 Chapter Summary

This chapter presented themes and sub-themes from a real-life consultancy project with a focus on the psycho-social foundations informing this scenario development project. The findings present a commentary on pre-existing organisational patterns and emergent conditions within the scenario development workshop. The psycho-social foundations in this project was the heritage and professional practice already embedded at Service Ltd. and aligns and reinforces many themes found in the liminal and scenario planning literature. Alongside a practice of creating spaces and times apart and a corporate memory that emphasised the heart of the organisation, it was apparent that the organisation was suitably primed to engage with this project.

The second part of the chapter provided a micro-examination of the psycho-social foundations informing the scenario development workshop. This highlights

the emergent capacity of the organisation and a variety of psycho-social components that are present in any scenario development space. This data informs the upcoming conceptual framework.

The presence of liminal supporters was introduced as a liaison point between facilitators and the client organisation to enable the creation of future-orientated knowledge. It is rare that any liminal space occurs in isolation where there is a complete 'untethering' from the business and having additional support outside the core facilitation team increases the likelihood of success within contemporary liminal spaces.

Together these different findings from this scenario planning project contribute to the developing lexicon of how psychodynamic and holistic factors influence scenario project outcomes. However, any conversation directed towards facilitators and how to encourage group and individual processes remains unaddressed. At the close of this chapter, the impetus remains to map the foundations of a practice-orientated framework for liminal spaces. Attention now turns to building a conceptual framework of designed liminality. The presented data supports predicated literature to bridge the gap between liminal theory and practice. The narrative provides a real-life example of the multiple psycho-social factors contributing to the development of designed liminality.

Chapter 6: Intentionally Designing Liminality

The finest art is to be able to stand in front of a room and feel the room's vibe and interact with the room and I think that at large scale organisations, some of the great leaders may not go through that description to get there. But they get there naturally. ~ John Donovan (2018), AT&T Communications CEO.

Recognising liminality is occurring within a scenario planning project is one thing, and learning how to first create and subsequently harness the forces arising in transitory environments is another. Achieving a cognitive shift and encouraging new ways of decision making is a core component of a sturdy future-orientated scenario planning project. It follows that understanding how to design, support and encourage the objectives of scenario planning requires both skilful facilitation, and the generous engagement of participants.

This chapter is guided by the research sub-question: '*What is the structure of a psycho-social transition in foresight and liminal spaces?*' The chapter in its entirety is dedicated to presenting a structured conceptual framework that addresses the liminal projects from the point of design to the point of deciding the next steps forward (strategy and beyond). Any number of interrelated dynamics are in effect when people create future-orientated knowledge. Throughout this study it has been apparent that a confluence of factors influences a project and often scaffolded engagement helps encourage people's attention and working expertise.

To explore this, the study focus now turns towards a five-phased conceptual framework emphasising the psycho-social perspectives of foresight and liminal transition. Focus is placed on 1) the cumulative elements enabling the relevant and impactful curation of the future; and 2) facilitator preparedness to support participant's

feeling trust and motivation to contribute to achieving successful project outcomes. Examining the designed liminality from a variety of angles highlights the different needs and expectations of the various parties. This referential tool provides and understanding about the specific inflection points allowing a safe space for uncertainty and creation.

Two additional phases at the front and conclusion of the known three-tiered liminal framework appear. The first, a *design* phase recognises the initial engagement and development of a project before the phases of *separation*, *liminality* and *re-integration* (van Gennep, 1960[1909]) and the scenario planning phases discussed in 'section 4.2: Consolidating the liminal and scenario planning frameworks.' A *strategy* phase bookends the framework, which represents a distinct movement into development of concrete tactics and strategies to ensure insights are translatable to one's life. In the current project this is the movement from developing scenarios towards developing strategy. These additional phases recognise the pre-liminal engagement undertaken by non-liminars (facilitators) and contributes to the requirements of continuation required within a professional and theoretical practice.

A variety of levels of engagement are also examined and the 'liminoid' concepts is repurposed. Each person brings their own personal history, insight, and understandings into a space and if engagement is fostered, personal growth is inevitable. However, what is ground-breaking for one can be normal for another. Insight can occur at different moments across a project and people can move in and out of healthy expression with activities during a project. This concept can be used as a metaphor for when an organisation is not primed for change and demonstrates a lack of psychological safety that disinhibits facilitators from optimising the liminal transition.

6.1 Facilitating Designed Liminality

The re-conceptualised liminal framework is structured around a distinct cadence (structure) represented by five phases: 1) project design; 2) separation; 3) liminality/foresight; 4) re-integration; and, 5) strategic development. The framework focuses on the psycho-social link between facilitators and group experience liminal phase in a psychological safe manner.⁴⁹

A *project design* phase was added to indicate the workflow occurring behind the scenes by the facilitators. This phase principally involves facilitators and key internal champions who design and refine the project. At this time early discussions are happening with a limited number of liminal champions about the parameters of a project (Burt & van der Heijden, 2003).

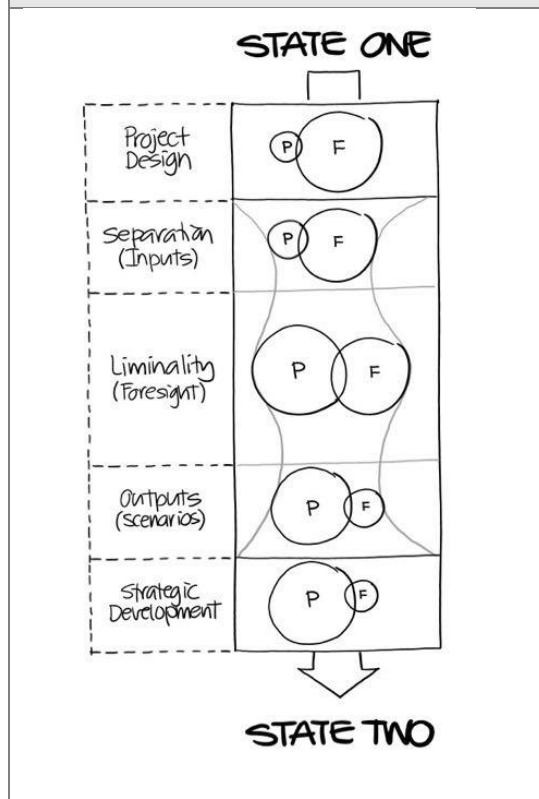
A fifth *strategic development* phase highlights the shift towards a traditional strategic development phase. This phase is the transition from scenario development to strategic planning (Wiek et al., 2006). This final phase is not creative and exploratory in the way the earlier foresight/liminal phase is. The development of relevant strategy is essential to scenario planning process being successful. The limitations of the current study mean that this stage has not been described in depth, and it is included here to highlight the full strategic agenda (Wilson, 2000).

Ideally, each party takes responsibility for their own growth and development within the bounds of a project or workshop. Figure 4 visually represents the level of engagement likely contributed by the participant (P) and facilitator (F) at each phase of a project.

⁴⁹ Schwartz (2009, p.9) describes this as "... the planner and the executive [as] partners in taking a long view."

Figure 4: PARTICIPANT AND FACILITATOR ENGAGEMENT BY PHASED TRANSITION

P = Participants F = Facilitators



Source: Author

The size of the circles represents a level of engagement of each party during each distinct phase. The early phases demonstrate the expertise, and time a facilitator contributes to develop a space and structure that allows participants to draw on their own expertise.

The style and application of scenario planning and the length of time applied in the liminal or foresight phase, are likely to influence the level of participant commitment.

The following section examines the transitory experience of individual participants at a cognitive level. Facilitators who have some understanding about what participants are experiencing will be able to support the development of future-orientated knowledge.

6.2 Participant Phase Transitions

Participants experience a range of psycho-social needs across a project. Each phase has challenges and opportunities for learning. 'Table 9: Designed liminality: Participant phase transitions' represents the participants cognitive transition through the five liminal phases. Column two represents the 'cognitive demand' experienced by participants during specific points within a project. The project design phase is included, although this does not involve much engagement from participants. Column

three presents ‘individual challenge’ the most likely challenge to be encountered in each phase. Each of the phases below has the potential to trigger resistance or unwillingness to progress (Chermack, 2011; Cousin, 2008).

Table 9: DESIGNED LIMINALITY: PARTICIPANT PHASE TRANSITIONS		
Liminal Phase	Cognitive Demand	Individual Challenge
Project Design	<ul style="list-style-type: none"> ➤ Limited Participant Involvement asides from preliminary discussions with project champions. 	<i>This phase preliminarily involves facilitators either imagining or presupposing projected cognitive outcomes and designing these based on their expertise and experience.</i>
Separation Inputs	<ul style="list-style-type: none"> ➤ Psychological Priming 	<i>Individual/ Group:</i> Comes into contact with a new process. Required to understand the process.
Liminality Foresight	<ul style="list-style-type: none"> ➤ Deconstruction of way/s of Thinking ➤ Collective Patterning <ul style="list-style-type: none"> • Strategic Conversation • Communitas. 	<i>Individual:</i> <ol style="list-style-type: none"> 1. Enters heightened cognitive versatility. 2. Needs to withstand psycho-social turbulence. 3. Practices reflexivity. <i>Group:</i> <ol style="list-style-type: none"> 1. Begins to have understanding about the processes currently being used to make decisions. 2. Collectively Integrate Expert and Creative Engagement.
Re-Integration Outputs	<ul style="list-style-type: none"> ➤ Reconstruction of way/s of thinking. ➤ The solidification of future-orientated knowledge. 	<i>Individual/ Group:</i> <ol style="list-style-type: none"> 1. Chooses which information to take forward. 2. Begin translating insights to applicable discourse (scenarios).
Strategy	<ul style="list-style-type: none"> ➤ Strategic Development. 	The translation of applicable discourse/information to actionable strategy.

Source: Author

Overlaps are likely to occur between the five phases because individual learners grasp different concepts at different times (Land, Cousin, Meyer, & Davies, 2006; Rattray, 2016), and groups do not always progress in a linear way (McKiernan,

2017). Rather, each of the phases are viewed as “overlapping waves” (Voros, 2003, p.11) and further variances between individuals are expanded in more depth in ‘section 6.6: Liminal or liminoid?’ The nuances of each phase are discussed in more detail below.

6.2.1 *Design*

No specific participant cognition was identified for this phase. Instead, this early stage of a project provides an opportunity for participants to gauge the capabilities of the facilitator and method. This will later influence the organisational buy-in a facilitator has during the project. Burt and van der Heijden (2003) also emphasise the importance of facilitators building relationships that will later contribute to project success, as this is best built from the outset. The experience of facilitators during this phase behind the scenes and is expanded in ‘table 10: Designed liminality: Facilitator phase transitions.’

6.2.2 *Separation: Psychological Priming*

Psychological priming assists people grasp the specificities and differences between a scenario project and a strategic planning project (Voros, 2003). Participants begin to experience a separation of sorts and a series of task-orientated steps progressively guide people to generate and redact key uncertainty factors (Franco & Meadows, 2011; O’Brien, 2004). This helps lay the foundations for the later development of rigorous future-orientated scenarios (Burt & van der Heijden, 2003; Wright et al., 2008).

At this point, failing to gain engagement can impede the success of the later scenario development phases (van der Heijden et al., 2002). Participants will be scanning the project environment to determine if it is safe to communicate new or contradictory ideas in their raw form (Cousin, 2008). This is unlikely to be overly

cognitively taxing for participants. At the same time, scenario planning projects are most fruitful when people are able to voice their opinions and processing “outside a pressure of immediate decision making” (van der Heijden, 2005, p.xvii). This necessitates genuine trusting conversation that feels psychological safe (Chermack, 2005; Georgantzas & Acar, 1995).

Participants are sending their view about scenario planning as a tool, and the facilitator. The over-reliance on strategic jargon can actually alienate some participants in this phase (Johnson et al., 2010). The signals that participants have not grasped the objectives of scenario development are diverse (Meyer & Land, 2005). People may describe the process as too complicated or difficult and express disbelief or anger (Voros, 2003). The danger in participants not understanding this phase is that the entire project will evoke shallow or rote engagement that results in unimaginative or substandard scenarios (Hodgkinson & Wright, 2002). This separation phase is essential to the scenario planning process.

6.2.3 *Liminal Phase*

Upon grasping the scenario development objectives, participants begin to engage with the liminal/foresight phase. This phase requires imagining the future without automatically developing strategic tactics (Schwartz, 2009; Tyler, 2006). Harris (2009, p.102) cites this as a “... period of unusual emancipatory license.” Johnson and colleagues (2010, p.1610) view this time as “...the potential for liberating participants to question the status quo and envisage change, coupled with emotional commitment and solidarity around such debate.” The liminal phase is iterative, paradoxical and there is no ‘right answers.’ As people become increasingly invested it becomes “... very difficult to get off” (Johnson et al., 2010, p.1589).

One danger during this time is participant frustration. People may feel a facilitator has to provide all the answers. If these expectations are not managed, disappointment can be felt on both sides (Burt & van der Heijden, 2003). If a facilitator takes on this role of providing their views of the future, this is equally disempowering to organisational growth and the development of these capacities.

The ethnographic notes from Services Ltd. (Chapter Five) corroborate the range of emotions and challenges present in this transitory space. Encouraging liminal thinking results in individual participants passing their perceived limitations and enhancing creativity for the rest of the group (also observed by: Sturdy et al., 2006; Szkolczai, 2015).

Two focal points were identified during this phase: 1) the deconstruction of cognitive models; and, 2) collective patterning, a collaborative movement towards the future where the group begins to operate in a way that supports debate, robust discussion and the creation of future-orientated knowledge.

6.2.3.1 *Deconstruction of Cognitive Models*

The deconstruction of cognitive models phase is essential to disrupt any engrained individual or organisational thinking (Thomas, 1994, p.6; Wilkinson & Kupers, 2013). It is anticipated (and even desired) that some level of intense debate occurs which brings hidden assumptions to the surface (Catron et al., 1980; Cove, McAdam & McGonigal, 2008; Hodgkinson & Wright, 2002). Once people feel comfortable, they gradually begin to explore different opinions and points of view.

At this inflection point, people can have number of reactions to having their worldviews questioned. One person may not feel comfortable voicing their “new and uncommon” views while another may see the benefit in questioning their own assumptions (Burt & van der Heijden, 2003, p.1014). Others may be surprised that

their own understanding of the business environment are different to others in their team (Inayatullah, 2015). Personal blind spots can inhibit the entire group with a sense of not being safe to share, which will “...slow proceedings considerably” (Hodgkinson & Clarke, 2007, p.248).

This phase is particularly individualistic. Although much work is happening in groups, the web of possibility consists of multiple individual views. Cohen (1985, p.55) describes this as having: “The salient boundaries and symbols of the participating groups change together.” This initially feels liberating, yet a range of emotions and potential triggers remain. There are indications that people are beginning to experience reactions outside their usual patterns of thinking and behaviour (Galer & van der Heijden, 1992; Simpson, 1992). This can largely be witnessed as subtle shifts in how people are discussing key ideas. For example, people who tend to be observers will feel safe to contribute their voice (Johnson et al., 2010; Turner, 1980). Another indicator of people entering this phase is that people’s everyday roles become less salient (Meyer & Land, 2005).

When a group is committed to the process, much benefit comes from navigating this phase together. The strategic conversation will elicit different views and develops new understandings. If this inflection point has been navigated, this signals a high level of engagement with a psychologically safe conversation. People feel comfortable to speak frankly and begin to coalesce around a shared goal. Everyday boundaries break down, and people who would normally remain silent begin to contribute their views. Surprising sharing serves as a catalyst to open the whole group to considering new future-orientated knowledge.

6.2.3.2 *Collective Patterning: Communitas*

The longer people engage with a designed liminality field, the more likely it is

that social coalescing occurs. The sense of achievement and camaraderie experienced during *communitas* helps support the solidification of insights gained during this time. Collective patterning is the most potent time of the liminal inflection and is not always a salient occurrence (Turner, 2012). People do register as an “extraordinary moments of collective presence” (Senge et al., 2004, p.1).

The collaborative interaction and social coalescing allow collaborative links that may not have occurred otherwise (van der Heijden et al. 2002; Cornelius et al., 2005). Indications are that if fostered well, there is much potential to leverage the collective energy and sense of camaraderie created in liminal spaces to direct triggering energy towards useful ends. The cohesion and wisdom of a group can develop future management capacity. Scharmer (2009, p.410) highlights:

In the midst of chaos and breakdown, we must develop the ability to stay calm and discern the path forward – even when that path seems ill defined and fragile. Developing the capacity to operate from the nothingness of the now...

Communitas was most evident when participants were acting out their scenarios for the group. All participants, including the CEO, were creative and shared their group’s scenario in a playful and heightened way. This represented the termination of the workshop as well as the beginning of a re-engagement with the everyday workspace.

6.2.4 *Re-integration*

The re-integration phase guides people to begin re-establishing some sense of cognitive normalcy after having experienced the peak of collective patterning. As a whole, liminality is intense, and workshops ask for high energy levels. These high levels of engagement are not sustainable in an ongoing capacity without practice. The

paradox and uncomfortable nature of the process propels people towards a desire for a “truth” or stability (Antonovsky, 1993), and motivates the re-integration phase a unified movement towards a coherent creation of a future narrative (Schön, 1983).

Returning to an everyday workspace holds a number of reactions from participants. This includes concern that what occurred in the workshop will impact one’s job negatively. Such sentiments are heightened if there are memories of having voiced any opinions, views, debates, or factors that were out of their usual character. A sense of disillusionment may arise if an organisation does not have the systems in place to translate scenarios into implementable strategy (Rohrbeck et al., 2015; Rohrbeck & Schwarz, 2013).

Chapter five showed the Services Ltd. CEO innately re-established his leadership role and began instructing the workshop participants about a dinner meeting that evening. This signals the return to normal roles, albeit hopefully with some shifts and changes. When a CEO does not re-establish their role, there may be a need for the facilitators to acknowledge the end of a workshop in a more structured and formal way that enables the reformulation of a group’s internalised ideas into an action-orientated plan.

Communication and clarification about the next steps forward begin. In the example of scenario planning this involves the development and implementation of strategy.

6.2.5 *Strategy and Beyond: Leveraging Liminal Insights*

The liminal literature rarely clarifies what happens after people return from a liminal experience. It is often assumed that insights ‘naturally’ become embodied and implemented. It is hoped that future research will examine the mechanisms

involved with translating insight into strategy (Chalip, 2006). Scenario planning accounts are also thin on the ground. What is known is that using scenarios requires practice and “sophistication” that takes time to master (Wilson, 2000, p.26). Converting scenarios to strategy, appears to rest, largely on pre-existing organisational capacity. Larger multinationals have success with this phase because of their infrastructures that already enable value creation and implementation (Rohrbeck & Schwarz, 2013).⁵⁰ If scenarios are raw and unfiltered, other organisational demands will take precedence, unless key individuals are championing this phase.

⁵⁰ Scharmer’s (2009) “Theory U” provides a position on the psycho-social requirements of implementing and prototyping that go beyond the scope of this research.

6.3 Facilitation Phase Transitions

Table 10: DESIGNED LIMINALITY: FACILITATOR PHASE TRANSITIONS		
Facilitator Role	Function of Phase Role	Facilitator Competences
Design	Procedural design (relational) Creating space	Set/clarify overall project intentions Develop trust in the method
Separation <i>Priming</i>	<ul style="list-style-type: none"> ➤ Building Trusting relationships ➤ Adjusting foresight design 	Priming the organisation. Priming the facilitator-self. Clarifying Co-Intentions.
Liminality <i>Holding Space (Holding Time)</i>	<ul style="list-style-type: none"> ➤ Purposive patterning ➤ Holding space ➤ Reflection-in-action 	Hold Intentions for the group Encourage psycho-social turbulence. Re-Setting group intentions (with new knowledge and alignment) Harness or enhance psycho-social turbulence
Reintegration <i>Withdrawal</i>	Removal of facilitator energy	Reflection-on-action
Strategy	Reframing expectations	If facilitators remain involved. Reset strategy for the coming phase.

Source: Author

“Table 10: Designed liminality: Facilitator phase transitions” The five-phased framework examines the specific facilitation competences identified.

6.3.1 Design

The “design phase” is the purposeful planning of a scenario planning project from the outset. Facilitators usually spend a lot of time engaging in behind-the-scene discussions and actions to increase the likelihood of project success. Examples include educating the select client members, gaining buy-in, and adjusting the project design (Voros, 2003). These practices help facilitators to ascertain the readiness of the organisation for a project. This involves discussions around developing clear

project parameters, a specific strategic aim, a well-defined purpose and understanding the existing organisational capabilities (van der Heijden et al., 2002).

Several layers are occurring at once including the initial engagement between executives and the facilitator. The facilitator can also be gathering some initial insight about prominent mindsets or habits in use. Burt and van der Heijden (2003, p. 1014-15) claim that:

Consciously and specifically addressing the “first steps” issue forces the parties involved, before the project is shaped, to be articulate on the basic purpose of such a project. In this way relevance and purposefulness of the project is ensured from the beginning, greatly enhancing the chances of success.

One tactic used by facilitators to understand the organisational mindset is a pre-intervention interview (Wright et al., 2008). The success of this practice may rely on a facilitator’s preparedness and willingness to engage with client questions and concerns (Burt & van der Heijden, 2003). In this instance, facilitators are seeking clues for any strategic inertia or obvious dysfunctional coping mechanisms that may arise when people perceive threats to the future environment (Wright et al., 2008). When organisational tensions or triggers are disclosed during early engagement, this awareness may help to guide these discussions purposefully and avoid excessive divisiveness in later phases of scenario development (Burt & van der Heijden, 2003; Johnson et al., 2010).

6.3.2 *Separation: Facilitator Priming*

The separation phase signifies the preparation of the organisation, the building of trusting relationships, and priming of the facilitator/s before the foresight phase begins. At a methodological level, this phase includes the collection of internal data,

such as interviews and focus groups, and includes deep listening. As well as collecting information in the form of interviews, facilitators are practicing a subtler form of reflective listening and some factors being observed may include:

1. *How are these leaders reacting to stimuli?*
2. *Do they plan extensively? Are they fluent in time? How do they communicate?*
3. *Is the emerging future something they view with trepidation, out of their control, or something they can actively collaborate with?*

This process gives more clues about the client culture and more understanding about how the organisation typically relates to the future (Burt & van der Heijden, 2003).

At a relational level, more people are becoming involved with the consulting team as the project 'officially' begins. Other individual participants who will be a part of the scenario development are now involved with the method and consultants. The relationships fostered lay the groundwork for the later foresight work required (Wilkinson & Kupers, 2013). If either the organisation or the facilitator is not feeling adequately primed for the project to begin there can be resistance to considering new ways of thinking (Vygotsky, 1978).

Facilitators have the ability to set (and subsequently maintain) a psychologically safe space. At a relational level this phase is extremely important as valuable insight is unlikely if people do not grasp the framework or paradigm (Burt et al., 2017). The way they comport themselves in group contexts, with clear guidelines and directions will support trust and engagement (Amado, 2009; Kahane, 2012a), rather than bewilderment and discomfort (Rudwick, 1996; Voros, 2003). These competences is largely learnt through having consultancy experience and it is rarely possible to foresee everything that will arise later in a project. However, attention to any cognitive

concerns arising can mitigate later unproductivity or frustration because participants feel heard (Fontana & Frey, 2000).

As was outlined in 'chapter four: section 4.1: scenario planning as a cognitive device,' organisations have different degrees of willingness to imagining a new future. The more an organisation is prepared and willing to think outside the box, the deeper transformation is possible; and the more an environment needs to be prepared for the coming liminal/foresight phase. Making sure that key internal members grasp the aims of developing scenarios will be helpful here. Separation and priming centres more on building relationships and gathering information, rather than explicitly challenging participants. Facilitators may already be gently challenging participants in interviews and meetings, without explicitly questioning cognitive assumptions about the future.

6.3.2.1 *Adjusting Foresight Design*

Before the scenario development workshop there is an opportunity for the facilitation team to adjust the design of the foresight workshops, to set the intention for favourable foresight conditions. It has been shown that pre-existing factors, such as the historical behaviours and tendencies of the client organisation will influence the development of scenarios (Ratcliffe, 2002). Such insight from the data and face-to-face engagement provides insight into a business's capacity for risk, conflict or having intense debate (Burt et al., 2017). These can be either enablers or barriers to a scenario project. Facilitators with experience will be able to identify potential trigger points and develop contingencies (Burt & van der Heijden, 2003).

In our current example, Services Ltd. was using a longitudinal strategic mindset and calculated risk-taking was already respected as a valid strategic direction. This enabled longer term discussions without any real concern of a schism between the participants and the facilitators. In other projects,

conversations, data and intuition will influence facilitators to review the structure and plan for a scenario development workshop (Hodgkinson et al., 2006; Schwartz, 2009). The facilitator may also be able to craft the specific dialogue that will challenge participants, without enabling old stories.

6.3.3 *Liminality: Foresight*

The liminal foresight phase calls for a facilitation skillset that is beyond a mechanistic or causal narrative. The liminal is uncomfortable for all who are involved. The shared reflections from the facilitation team in the consultancy project indicated that facilitators do become engaged with the liminal attributes in a workshop and are in fact a part of the altered space (Personal communication, Main Facilitator, 15th March 2017).

Ideally, during this time, facilitators are not ‘controlling’ the environment and are relying on their expertise and pre-established ability to respond and guide uncertainty. As the liminal period intensifies and tiredness begins to creep in, the need for holding competences increase. The facilitator withholds from ‘leading’ participants to the ‘right’ answer, and instead to allows participants to draw on their own expertise and understanding about the future. This can cause projections on the facilitator to increase which increases the likelihood of facilitators being triggered or inappropriately responding to participants. When participants encounter their optimal level of scaffolding they become deeply engaged in their own process and begin to support each other, with minimal facilitator input. This helps people to “...regain their equilibrium and continue on their way” (Kahn, 2001, p.263).

During this temporarily non-linear, creative phase a number of pitfalls exist for facilitators and how facilitators respond to participant frustration or projection towards the facilitator will differ from person-to-person. Possible facilitator pitfalls

during this time include: 1) facilitators becoming too caught up in the inherent messiness of the liminal process; 2) facilitators becoming triggered by participant emotion; 3) facilitators alienating participants by using overly technical jargon; or 4) facilitators being unable to step outside a technical controlling educator role. The first two highlight how important it is for non-liminars not to be drawn into the liminal experience. Becoming too deeply engaged with the participant's liminal attributes can influence participant frustration and the range of emotions expressed in the strategic conversational space (Schön, 1987).

The second two pitfalls fall at the other end of the spectrum where a facilitator avoids the vulnerability of liminal space. This can serve to maintain a narrow view of scenario planning whereby difficult conversations feel too tense when participants are exposing their shadow stories. If a facilitator adopts a removed stance and is uncomfortable, or judgmental, participants may feel bitter about being asked to share their creativity and vulnerability, when the facilitator is unwilling to do the same. It is not necessary for facilitators to disclose their personal stories, yet the selective revelation of oneself helps to encourage sharing beyond a typical organisational process.

The degree of complexity, emotion or frustration facilitators are capable of holding will dictate the ability participants have to discover their own wisdom and expertise. Allowing participants to experience their own discomfort and express deep-seated emotionality permits these energies to run their course and allows participants to think beyond their previous capacities. Facilitators build the ability to know when to heighten the intensity and when to minimise it. The following subsection outlines the interrelated holistic facilitation competence of purposive patterning while holding space.

6.3.3.1 *Purposive Patterning: Holding Space*

Holding space is a form of purposive patterning informing the psychological safety of a facilitated space. This competence involves an active and passive energy exchange that communicates a facilitator's own capacity to hold participants in a meaningful, relevant and empowering manner. Quinn (1992) considers that "...purposive patterning of energy fields" (p.26), includes: 1) strong professional modelling about the boundaries of the space; and, 2) some degree of vulnerability and trust in the organisation's vision. Thus, enabling the reciprocation of these characteristics by the participant group (Atkinson & Robson, 2012; Savin-Baden, 2006).

Both these elements are communicated verbally and non-verbally, for example, the way room is set up will communicate how people will response to comments, questions and concerns (Miller, 1995). Attention to these details helps create:

A strong "container" within which these actors can transform their understandings, relationships, and intentions. The boundaries of this container are set so that the team feels both enough protection and safety, and enough pressure and friction to be able to do their challenging work (Kahane, 2012a, p.20).

Other examples position purposive patterning as a dynamic activity whereby a facilitator will begin to change tone, speed and the direction of a workshop. Experienced facilitators are able to intentionally spark debate or calm people down depending on the needs of an environment (Donovan, 2018; van der Heijden et al., 2002). The competences of reflection-in-action and deep listening continue into this phase of the project, thus influencing the ability to read and respond to the environment. In this manner, facilitators demonstrate their legitimacy and expertise to

participants. Carson (2016, p.53) shares:

The listener is expecting much, in fact no less than a courageous and honest ritual leader who is willing and able to wrestle with the hard questions. This wrestling ... gives courage to the listener to do the same.

Conversely, a lack of confidence in holding other's processing can send mixed signals to participants (Kahneman, Rosenfield, Gandhi & Blaser, 2016).

During the consultancy, the practice of opening the workshops intentionally provided the opportunity to set expectations for the day. The legitimacy of the workshop was further supported by the interaction between the main facilitator and the CEO. These cumulative interactions serve to enhance the emergence of new knowledge. Small and big factors communicate to people that an environment is safe and that they are safe to experiment, even while tired.

When a facilitator enters this competence, Scharmer (2009) suggests that the facilitator is entering into a co-presencing space. This holistic perspective also emphasises the heightened responsibility participants have for their own emotions and reactions during this time as they are likely feeling the group patterning (Scaife, 2010). A variety of personalised styles of reflecting which emphasises the importance of facilitators beginning to critique and reflect on their own practice (Knowles, Tyler, Gilbourne, & Eubank, 2006).

6.3.4 *Re-integration: Withdrawal*

The intensity arising from liminal interactions is temporarily desirable to challenge people towards change, yet is not sustainable in an ongoing capacity. The re-integration phase is an important time where participants translate their learnings into applicable action. The energy, feelings of potential and insights fostered in the earlier liminal phase are now directed towards achieving resulting

strategies and interventions.

Traditionally, closing a liminal space would involve a pre-established cadence that allows facilitators to gently close the liminal experience with the process being supported by the environment (Atkinson & Robson, 2012). Leaving liminal spaces suddenly, or exiting and not acknowledging individual's contributions or insight, can leave people feeling abandoned. Perhaps unable to trust organisational interventions, with the risk that similar projects will not receive support in the future (Kahn, 2001). For scenario planning projects it is essential that the organisation feels confident to embark on the development of specific strategy with the support of the participants. An abrupt or sudden ending may make returning to everyday work difficult.

During the re-integration phase facilitators begin handing 'power' back to the managers and organisation. This transition from the competence of holding and purposively patterning towards withdrawal is an important inflection phase for facilitators. The challenge at this time is that participants can have heightened expectations and it will be helpful to set a new intention for the coming state (Scharmer, 2009).

This stage holds the most potential to activate a liminoid experience, whereby participants are unable to return to their everyday work because they feel disillusioned. In essence, the organisation believes the project is over but people feel dysfunctional and carry this into the workplace.

6.3.5 *Strategy and Beyond: Debriefing, Reflection-on-Action*

The involvement of a facilitator beyond the scenario development phase will differ from project to project. Each organisation will create liminal programs in their own ways, with their own knowledge, and to meet the needs and demands that are

unique to their business. If a facilitator stays involved for the creation of strategy, the separation, priming and design phase begins again with both parties establishing the next steps forward. New parameters will be re-articulated and re-clarified to create robust strategy.

At an individual level, facilitators will also reflect on their own practice. This is a core component of liminal spaces and everything that took place amidst a project (Beavitt, 2012; Cook-Sather & Alter, 2011; Hulme, Cracknell & Owens, 2009; Iedema, Long & Carroll, 2010; Schön, 1987). Project developers and designers will also be called to identify the valid constructive feedback and identify obstacles or adapt behaviour for future projects. This may catalyse the redesign of activities, challenge may be scaffolded in a different way, or additional support materials required may be noted. It is possible that future attention to mentoring or peer collaboration may enable the necessary shift in perspective that might permit further personal facilitation development (Meyer & Land, 2005, p.377).

The facilitation phase transitions have addressed specific focal points and competences enabling facilitators to work confidently in liminal space. These factors influence the flow of a project including the interrelationship between a facilitator and the client organisation's participant phase transition.

6.4 Layers of Liminal Engagement

In flow we feel that our abilities are well matched to the opportunities for action. In everyday life we sometimes feel that the challenges are too high in relation to our skills, and then we feel frustrated and anxious (Csikszentmihalyi, 1996, p.10).

As with any psycho-social measure, outward appearances are not always indicative of people's engagement or understanding. This section examines how people begin a project with different levels of involvement; despite facilitators expecting continual creative engagement. The majority of the discussion so far has presented the group as a collective force whereby people are undergoing a similar process and reporting similar experiences. This is rarely the case and people will continue deciding how to engage across the project (Cohen, 1985). Collective cohesion is present in any transition, but individuals are also each bringing their unique history, competences and having very different motivations for being involved in the process (Rattray, 2016).

Facilitators in corporate contexts have different responsibilities than non-liminals in ritual contexts. This consists of ensuring participants are not overly triggered by the stimuli and monitoring engagement. Most scenario planning projects last a minimum of three-months and fluctuations in flow and optimal performance will occur (Hagel et al., 2016a). Monitoring participant engagement can be a difficult task. People may appear unengaged while actually processing information internally. Others will enjoy applying cognitive versatility and some will prefer rote learning (Burt et al., 2017). There are different types of flow for different personalities (Gruel, 2017). Moreover, people have distinct capacities to practice foresight (Hodgkinson & Clarke, 2007). Some will operate at their optimal capacity whereas others may feel overwhelmed and need rest periods.

'Table 11: a continuum of liminal engagement,' provides an abridged map showing three levels of engagement an individual may be experiencing. The table was developed using the example of scenario planning, therefore the range and depth of the optimal zone will differ in other liminal profiles. This is a foundational overview

of engagement during a project and particularly relevant to scenario development workshops which heighten the strategic thinking of participants (Liedtka, 1998).

Table 11: A CONTINUUM OF LIMINAL ENGAGEMENT	
Description	Attributes
SHALLOW ENGAGEMENT	
Strongly cognitively engaged with everyday practice and mental models, unable or unwilling to see other's worldviews.	<ul style="list-style-type: none"> ➤ Unengaged /apathetic ➤ The individual feels unsafe ➤ The individual feels unengaged • Can make the environment unsafe for others and slow the process of collective patterning • Non-versatile thinking
OPTIMAL CREATIVE ENGAGEMENT	
Beginning to enter the subliminal zone (beyond a cosmetic understanding). Optimal organisational liminal training zone - <i>Lim-analysis</i> .	<ul style="list-style-type: none"> ➤ Secure and open ➤ Psychologically safe ➤ Optimally creative <ul style="list-style-type: none"> • A collective patterning and beneficial sharing of insights between the participants. • Open-minded
TRIGGERED ENGAGEMENT	
<p>Personalised views of the future that do not take into account the organisation. Disruptive and deep internal processing.</p> <p>For example, someone may create a future where their job does not exist in 10 years invoking a number of responses.</p>	<ul style="list-style-type: none"> ➤ Triggered / obsessive ➤ The individual has lost perspective of the project parameters, aims, and/or limitations ➤ Impossible or unrealistic expectations ➤ Feelings of fear or a lack of agency • Fixation on a negative future, rather than empowered to set change in motion • Judgmental

Source: Author ⁵¹

6.5 Liminal or Liminoid?

A liminal situation should never be induced without a proper form in hand to impose on the soul of those whose emotions are stimulated by being put at the limit (Szakolczai, 2015, p.29).

⁵¹ The need for this table became apparent from a number of non-academic locations including discussions held at AdventureWorks WA (2017) and Riso and Hudson's (2000) levels of development which they range from "Liberation" to "pathological Destructiveness" (p.157).

As this chapter comes to an end it is conceded that there is relatively little acknowledgment in the contemporary liminal literature about the risks involved with provoking liminality in organisational spaces. In drawing on a case study, scenario planning and liminal accounts, this study has demonstrated that invoking the liminal within the current corporate parameters is a thin line to tread. Scenario planning transitions allow a level of engagement beyond the cosmetic; yet participants are also challenged in their skill and will (Andreescu et al., 2013). There is the potential for individuals to personalise the experience and the business environment may not be ready for this pursuit (Burt et al., 2017).

This section is a conceptual analysis of the liminoid sub-concept previously introduced in 'section 2.2.4: Presenting the liminoid.' The liminoid is framed as a relevant practice-orientated tool to consider the readiness of an organisation using scenario planning. This is distinct from the current description of the liminoid as an unhealthy state of the modern condition (all modern transitions). Instead, the liminoid is suggested to help facilitators monitor the depth to which they guide participants to immerse in considering change.

The health of an organisation can arise from a covariance of factors. The following may be utile in opening people's eyes to organisational culture, behaviours or blocks that they were not aware of previously. Some signals that a business environment is structurally unprepared for a healthy liminal transition will include consistent breaches of trust (either perceived or real) (Goldberg, 1989). A high degree of ongoing or permanent liminality whereby employees de-sensitised to a healthy expression of liminality (Czarniawska & Mazza, 2003). If an organisation has undertaken previous change processes without results; beginning another process will be extremely unsettling (Johnson et al., 2010; Kahn, 2001).

Further components that are disincentives to challenge people's cognition in depth include excessive play (rather than directed creativity), the absence of data, repetitive critique of the present, CEO dominance, pride or passion (MacKay & McKiernan, 2010). The group may be unable to move past a high level of superficiality, or there could be a break of trust which suddenly interrupts the liminal process. This can "...bind people to and seemingly make palatable punishing situations" (Kahn, 2001, p.276).

Every organisational culture is unique and there are no broad definitive enablers of organisational schism or break down. Further research focused on the liminoid is required. However, if a facilitator determines an organisation is unsteady, it may not be optimal to push people more deeply into uncertainty than is necessary. When facilitated consciously, a liminal transition encourages psycho-social turbulence within the participating group; such disorder is purposeful but not "the purpose" of the space.

Scenario planning projects can last a year or more and these spaces require constant and ongoing dialogue between facilitators, participants and key supporters (Lucas & Mladenovic, 2007). In the best instances, these conversations help elicit new information and understandings, that if not understood can cause much bewilderment (Rudwick, 1996; van der Heijden et al., 2002; Voros, 2003). Facilitators who allow for fluctuations of engagement within their project design will be able to avoid feeling bitter or frustrated about holding a necessarily messy practice (Aglicia, 2005). Maintaining a high level of trust space helps to withstand the potential pitfalls and facilitators who understand the nuances of psycho-social relationships can support both the creation and anchoring of new knowledge that will contribute to the future.

6.6 Chapter Summary

This chapter established a designed liminality framework which contributes to a growing facilitation lexicon. In response to the research questions, *‘What are the psycho-social foundations of a practice-based framework for liminal spaces?’* The conceptual framework addresses the diverse competences involved with facilitating a space where people create new knowledge, they intend to later implement. A scenario-informed strategic planning project provided the impetus to research the conditions required to facilitate and create successful future-orientated knowledge resulting in a designed liminality framework. The delineation and exploration of the phase transitions from a participant and facilitation perspective to provide a resource description of the scaffolds within a scenario project.

The ‘designed liminality: participant phase transition’ argues that the psycho-social foundations for a designed liminality framework, is recognition of the different cognitive needs and challenges encountered at different inflection points of a scenario planning project. Psychological preparation, deconstruction of existing ways of thinking and collective patterning were described. The deconstruction of cognitive models highlights the importance of challenging people’s worldviews and the success of this phase plants the seeds for later phases. The framework positions collective patterning as a signal that the group has navigated the disruptiveness of the earlier deconstructive of their assumptions and begun to understand the importance of the robust debate required for real engagement in change.

The ‘designed liminality facilitation phase transition’ section focused on the holistic competences required to support participants who are imagining new futures. The phases of ‘design’, ‘separation’, ‘liminality’, ‘re-integration’, and ‘strategy and beyond’ outline the role and skills required by a facilitator. The framework identifies

the competences facilitators draw upon, including holding, allowing participants to be comfortable and work through their own discomfort, patterning, encouraging group dynamics and sharing their energy consciously. Different skill sets will be required in each of the different planning phases. This framework is unique in the focus contemporary organisations.

Rather than assuming all businesses will mirror the findings from the scenario planning project at Services Ltd., two additional conceptual iterations were added, 1) a conceptual model for layers of liminal engagement which recognises individual differences; and 2) a discussion on 'liminal or liminoid.' Both these inclusions recognises organisations may be far from ready to engage with scenario planning, let alone scenario planning transformation. Not all contexts, or people will be prepared, or supported to engage with liminal transformation. Rather they may be primed to disempower participants.

When examined together, each of these early conceptual frameworks and discussions emphasise the considerable importance that psycho-social foundations play in achieving the aims of contemporary liminal spaces. It is apparent that of participants are challenged when entering such engagements, and that facilitators face many nuanced challenges knowing how best to elicit the required participatory group action and support liminal spaces.

Chapter 7: Conclusions and Future Research

Designed liminality is at an emerging and dynamic point of its development. When this research first began, it became increasingly apparent that the scholarly foundations of practice-orientated liminality were not sufficiently established to undertake the intended research, which was to understand the enablers of liminality in a facilitated context. As a result, the research changed trajectory and focused on addressing the research question: *What are the psycho-social foundations of a practice-based framework for liminal spaces?* The findings from this conceptual analysis approach was the designed liminality framework, which synthesises research across the liminal theory, scenario planning disciplines, and a real-life consultancy which serves as a prototype. The research was closed with the presentation of a conceptual framework addressing participant experience and facilitator competence required to encourage liminal participation.

The research systematically applied a concept analysis approach to build an understanding of the pre-existing research and move towards developing a conceptual framework with the overarching research question guiding the writing. In pursuit of this research question, a series of different sub-questions directed each chapter. Chapter two was broken into two parts, first: **Sub-question 1:** *How does the liminal literature currently discuss the psycho-social design and facilitation of project spaces?* And; **Sub-question 2:** *How does the scenario planning literature currently discuss the psycho-social design and facilitation of project spaces?* Chapter three was directed by **Sub-question 3:** *What is the best research approach to consider this foundational psycho-social practice-orientated liminal theory?* Chapter four then asked, **Sub-question 4:** *Is scenario planning suitable to inform the practice-orientated design and facilitation of liminal spaces?* The analysis of the consultancy

data was driven by **Sub-question 5:** *What are the psycho-social foundations of a practice-based framework for liminal spaces?* ‘Chapter six: Intentionally designing liminality’ was directed by: **Sub-question 6:** *What is the structure of a psycho-social transition in foresight and liminal spaces?*

‘Chapter two: The liminal and scenario planning waters’ introduced the field of liminality, and the origins of the anthropological research method. It was found that a tendency remains to examine liminal contexts within the same anthropological practices used to study other cultures. The distillation of research into distinct profiles contributed insight about the broad range of contexts in which the concept can be applied, as well as the contributions each of the different profiles adds to the current discussion. This suggested that research on the design and facilitation of liminal spaces in contemporary business environments requires a different approach for those considering facilitation. Together, the various profiles hold different strengths that together provide a comprehensive approach to contemporary liminality.

The second part of chapter two discussed the scenario planning practice from its emergence as a military simulation tool, to current applications. Scenario development has a history of being practiced in business environments for more than fifty years (Abrahamson, 1991; McKiernan, 2017). Scenario planning is known to purposefully scaffold participants to deconstruct existing mental models (McCulloch & Field, 2014). A creative phase, known as the foresight phase, supports organisations to consider their strategic future in an innovative way (van der Heijden et al., 2002). The psycho-social particulars of the foresight phase have not received much attention in recent years (Rowland & Spaniol, 2017). Further very little distinction has been made about the different participant requirements at each phase.

‘Chapter Three: Mapping the method and methodology’ gave a detailed description of the method and methodology informing this research. It described the empirical concept analysis approach used to examine, clarify and expand the practice-orientated liminal literature, participant data and practitioner observations from a scenario-informed strategic planning consultancy. An explanation of the consultancy data collection and research process were provided giving details about the context for this research.

‘Chapter four: ‘Uncharted waters’: Scenarios as liminal space’ presented scenario planning and liminality as complementary discourses and provided a robust narrative about the design and facilitation of transformative spaces. The chapter began by discussing scenario planning with a sociological and cognitive lens. The liminal and scenario planning frameworks were then presented alongside each other to demonstrate the confluent phases of both scenario planning and liminality. The chapter continued on to discuss the underlying differences and gaps in each body of work, particularly surrounding the differences in research approaches, rhetoric and the presence of facilitators in each field.

‘Chapter Five: The heart of corporate memory’ examined data collected as part of a real-life scenario development consultancy. The chapter examined the psycho-social components emerging first from textual data extracted from individual participant interviews and focus groups, and a Delphi study. This data highlighted that the organisational culture of Services Ltd. was aptly primed for a liminal experience. The pre-established characteristics supported the needs of scenario planning and included an aptitude for discerning risk-taking, longer-term strategic planning practices, reflection and the ability to have difficult conversations. The second part of chapter five, briefly considered the importance of a leader devolving

power and introduced the concept of liminal supporters. These nuances are some preliminary observations that arose from the ethnographic data. This study is a stand-alone case and as such further research is suggested to ascertain the impact that different styles and durations of scenario planning projects have on liminal outcomes.

‘Chapter Six: Intentionally designing liminality’ presented a five-tiered conceptual designed liminality framework that drew the findings from each other the chapters together. In outlining the psycho-social experiences of participants and the different roles that facilitators play when supporting a workshop an organisational liminal process was described. This moves the liminal and scenario planning discussion away from generalised characteristics and differentiates what to expect, from suggestions on how to support each of the distinct phases.

7.1 Research Outcomes and Contributions

There are several practical and theoretical contributions and implications from this research. The most significant contribution is five-phased designed liminality framework focussing on the intentional psycho-social factors during a scenario planning project. The focus on the psycho-social interaction and facilitator’s role within a scenario planning project adds an additional layer of discussion to already established practice. The findings have relevance for designed liminality across a variety of contexts and contributes to liminal theory in multiple ways.

7.1.1 *The Confluence of Liminality and Scenario Planning*

The main contribution is the cross-disciplinary examination of liminality and scenario planning together. This is the first time the two have been compared,

contrasted and synthesised in depth. Examining scenario planning with an empirical concept analysis research approach is unique to the field. This interdisciplinary research is an intersection of theory and practice. This offers an alternative perspective to the scenario planning community-of-practice, which typically concentrates on process validation, and process improvement. Care was taken to communicate the existing psycho-social knowledge of scenario planning. The focused explanation of optimal psycho-social processes, tools, and strategies will inform other methodological and facilitation considerations in scenario planning.

The resulting findings have a number of implications for the creation of foresight spaces. The combination of practice and academic scholarship articulate and capture the changing landscape of contemporary businesses and provide insight into the psycho-social demand and need for participants and facilitators in this pursuit. The confluence of liminality and scenario planning resulted in a number of contributions to facilitation in the liminal/foresight domain.

7.1.2 *Liminal Theory*

This study lays the groundwork for future attention to processual liminality is best enabled within organisations. The first contribution was a comprehensive contemporary analysis presented in 'Section 2.4, Table 3: Liminal domains across the research spectrum' is a unique presentation of the breadth of liminal research across the disciplinarily spectrum. The eight distinct liminal research profiles emphasise that liminality is not approached generically as a research field. Rather the concept has different locations of research, each with differing levels of intensity and different research questions. For example, the anthropological profile; traditional ceremonial (rites of passage) is only one profile amongst many

branches. However, core assumptions and terminology from this branch are automatically accepted and applied to other contexts, without critique of the relevance to the study in question.⁵² At the other end of the spectrum, the table demonstrates that contemporary research focuses on liminality occurring unexpectedly or abruptly, rather than intentionally. The table does not disregard the other profiles of contemporary liminality studies, yet does place an emphasis on establishing an intentional liminal direction.

A second contribution was the inclusion of facilitators within the liminal discussion. From the outset, the most surprising finding from the literature review was the apparent absence of facilitators within the liminal literature. This finding directed the study towards providing the first in-depth discussion about the role of guides (non-liminars) relevant to contemporary businesses. Turner's dominant construct of non-liminars has largely remained unexamined in contemporary liminality. The existing conception does not adequately inform collaborative practices that rely on group expertise, as with scenario planning. This research presents the importance of co-creation between participants and facilitators. Competences of co-creation and operating across holistic and technical competences within organisational parameters is essential to project success.

The third contribution is the contemporary consideration of *communitas*. *Communitas* was assessed in relation to practice, rather than theory. Although Turner's conception of *communitas* has been disputed by a number of scholars (e.g. Cohen, 1985; Esposito, 2010), many of the so-called 'tribal' interactions have been romanticised and idealised by Western scholars (Bowman, 1995).

⁵² Rather the context itself is critiqued as not being 'optimally liminal,' thus disinhibiting future-orientated learnings.

Communitas is multi-faceted and is apparent in our organisations.

This research emphasised the importance of priming key leaders being to provide the space for others to voice their opinions. Role equalisation is not automatic, but a choice by individuals and the result of relationship building, education and structural preparation as outlined in the designed liminal framework. Moreover, 'Chapter Five: The Heart of Corporate Memory' demonstrated that the power of ritual invites a sense of equality. The CEOs nuanced holistic skills allowed a liminal space to work towards the organisations benefit. This research has clearly demonstrated that a leader gradually dissolves into a temporary state of 'antistructure' by choice and cumulative actions.

The fourth contribution was the introduction of liminal supporters who are a liaison point between facilitators and the client organisation. These people are not responsible for facilitating, but have an understanding of the mental models, and processes of the organisational management team. It will be rare in any liminal space that a complete 'untethering' from the business occurs and having these additional supporters ensures that a connection to the agreed aims and objectives remain at the forefront of everyone's mind and are symbolic of the operational boundaries amidst the broader liminal immersion.

The fifth contribution is the contemporary consideration of the liminoid. The liminoid has been selectively adopted by scholars. When it has been acknowledged, the liminal is assumed to be 'authentic' and the liminoid as 'inauthentic.' A large proportion of those who cite the liminoid accept the view that the liminoid is mechanical and synthetic (Lett, 1983), and that *all* Western transitions are unable to create or support these 'genuine' liminal experiences (Turner, 1987). These

parameters of this dichotomous construction are subjective and not useful to supporting contemporary people wanting to transition liminality safely.

The liminoid was presented as a barometer for facilitators to establish the readiness of a foresight environment. Future research will help build an understanding of how to further empower people's proximal layer of development without magnifying a sense of hopelessness. Instead, a permanent or temporary liminoid (non-optimal) environment signals a time to regroup, rest or address key issues. Rather than pushing participants deeper into uncertainty, facilitators can harness organisational traditions, tendencies and patterning to begin developing a psychologically safe environment for all.

In summary, each of these assessments and re-conceptualisations provide a foundation for future research testing, validating and extending the applicability of designing liminality and a liminal practice. The resulting presentation of a purposefully designed liminal space contains less of an ephemeral or mystical quality, and rather demonstrates that much more potential exists to expand the understanding of successfully shifting cognition within organisations.

7.1.3 *Facilitation Practice*

It is rare for a scenario planning project to be subjected to a sociological or psycho-social analysis. This research found that psycho-social elements support many emergent contributions to foresight spaces. 'Chapter four: 'Uncharted waters': Scenarios as liminal space' developed a psycho-social lexicon that emphasises the holistic facilitation skills and competences. The concept analysis demonstrates that leaders and facilitators alike are applying psycho-social tactics to influence the success of a scenario development workshop. In combining the two, it became apparent that a facilitator's own cognitive tendencies, assumptions

and understanding of the future is as likely to influence the project as the participants.

The designed liminality framework is relevant to facilitators. and links the foresight phase with the liminal space. This resulted in a number of distinct contributions, outlined below. In its entirety, 'chapter six: intentionally designing liminality' contributes a unique conceptual guide for facilitators wanting to work directly with liminal space.

First, the range of competences involved with harnessing and engaging directly with liminal/foresight space are addressed within the context of each liminal phase. The particulars of holding and patterning were outlined, making an argument for holistic competences being just as important as methodological ones when individuals are being challenged cognitively. Facilitation encompasses a range of psycho-social tools that can be learned, adapted, developed and honed with engagement and attention. When honed well, facilitation competences allow people the respect and time to navigate their emotions about the future. With this, comes the ability to harness and channel people's wisdom and expertise, whereby the organisation benefits from people's individual intellectual property in a willing manner.

Second, this early theorising about the fluctuations of participant input offers a new perspective for scenario planning. It emphasises that motivation, understanding and engagement will likely fluctuate across a project. There are unique and individual differences between participants. This gives voice to the nuanced scenario planning facilitation competences that are already being enacted. It is proposed this extends beyond what is generally presented. It remains undeniable that a facilitator's assumptions and worldviews have as much

influence on project design and implementation. The opportunity remains for examination of this phenomena from a psycho-social perspective. The layers of participant engagement reminded facilitators to observe and consider people as unique, rather than generic.

7.1.4 *Translating the Findings to Other Contexts and Environments*

The findings from this research can be re-applied to a variety of contexts and environments and translates to other professional environments where relationships and up-levering play a role, such as, education, coaching and mentoring. The foundations of the designed liminality framework were drawn from a variety of locations, and as such speak directly to these contexts.

The active facilitation of liminality is most relevant when groups are seeking transformation. The example of Services Ltd. cited in this research is only one example of a liminal facilitation, however, it is known that other groups are already practicing designed liminality (AdventureWorks WA, 2017; Mankind Project, 2018). The reason these groups are activating liminality is different from the corporate aims of Services Ltd., nevertheless the framework of the designed liminality process remains the same.

In any contexts that demand change and accountability, such as coaching, personal development, and organisational strategy spaces the phases of designed liminality will likely appear. The five phases of 'design', 'separation', 'liminal', 're-integration' and 're-focus for the future' phases will arise and the findings from the conceptual framework will support facilitators, educators, coaches and leaders.

Future research in how the findings translate will be beneficial in each of the examples given here.

7.2 Limitations to the Study

From the outset there were a number of limitations associated with this study. The first limitation was the lack of practice-orientated research involving liminality when this research commenced in 2013. Publications have recently emerged from threshold concepts theorists that support the research undertaken here. Irving, Wright and Hibbert, (2019) examined a liminal transition in a management context identifying how students navigate liminality as a progressive process. Timmermans and Meyer (2017) present a foundational framework for educational developers wanting to embed threshold concepts into practice. Organisational theorists Söderlund and Borg (2018) undertook an extensive systematic literature review of organisational liminality which would have provided foundational structure to the early phases of this work. The findings in these articles support many of the claims made in this study. Despite these frameworks and categorisations not being available when this research began, the overlap once again demonstrates the need and applicability of designing liminality in real-life contemporary contexts.

The second limitation was undertaking of a research project within the boundaries of a real-life consultancy project. The analysed data was collected under the umbrella of a strategic planning exercise (Miller, 1982; McArt & McDougal, 1985). The questions were not directly designed to ask participants about their interpretation of liminality and the process. Instead, interviews, focus groups and Delphi data was collected to gather specific types of information, from various stakeholders, for Services Ltd. strategic aims. Many themes arose informing the current study, this necessitated an exploratory research approach with a reliance on emergent research questions.

Thirdly, the use of an ethnographic approach had some implications for the researcher in the role of both practitioner and researcher. When a researcher holds multiple roles and lenses, meanings become continually negotiated and adapted (Kahn, 2011). The proximity of the researcher to the ethnographic observation period during the facilitation space was a dominant concern. As a member of the project team responsible for guiding participants through the scenario development workshop process, the use of ethnographic research is never purely objective (Easterby-Smith et al., 2015).

The fourth 'limitation' is also a strength in that this exploration is limited to a single organisation. Some researchers claim this approach is limited in the inability to determine experiential control. From a traditional research approach, the ability to generalise, or replicate across organisations is a weakness because it is "...open and unpredictable conditions of the real world" (Locke, Spirduso & Silverman, 2000, p.135). However, this research is studying 'real life' and provides a deeper understanding of the nuances and characteristics of an organisation that can inform other's unique culture and conditions (Yin, 2014). In essence, this type of research is more valuable to practice than lab-based experiments for these types of studies provide relevant material for future business learning, enquiries and discussions (Bell, Bryman & Harley, 2018).

Finally, linking scenario planning and liminality presented a number of epistemological differences. The difficulties centred on how knowledge is understood. This was the first time that a social science theory (liminality) and a strategic practice (scenario planning) were considered together. Each discipline had divergent discourses and aims. Specific difficulties have been addressed

throughout the study and necessitated discernments about research approach, research questions and the discourse to adopt for this study.

Given the exploratory nature of the field, the preliminary development of an intentional structure with follow up interviews were considered beyond the requirements of a Master's thesis. It is hoped that future studies can test how participants understand the boundaries of this transitional period, where their ways of thinking are challenged. This project was explorative and conceptual in nature. There remains significant potential to further liminal understandings, inclusive of organisational interests.

7.3 Future Research

Each of the contributions opens up further pathways for future investigation. For designed liminality to be validated as a liminal framework, it needs to be accessible to and inclusive of stakeholders, and practitioners. As such, future research exploring scenario planning experiences and the enablers of optimal liminal transitions is encouraged. Understanding the contextual elements that support a leader's ability to trust and discern the optimal level of intervention will be important for the creation of designed liminality spaces.

7.3.1 *Bridging the Gap: Theory and Practice in Organisations*

One invitation for future scholars is to continue bridging theory and practice in business. The designed liminality framework drew from both scenario planning and liminal theory and practice. Future research on the various influences support non-liminars to harness any liminal attributes arising during a scenario planning project. This can be inclusive of the most effective ways to challenge and extend

top managers' futures thinking. Emerging research in neuro-cognitive studies and threshold practice provide some interesting invitations to examine the responses to engaging with the future (McKiernan, 2017).

7.3.2 *Further Research on Liminal Facilitation Styles*

The potential remains to expand designed liminality and focus on the different facilitation styles. Future topics of investigation may focus on the variation of scenario projects and how a facilitator's view of the world impacts individual behaviours (e.g. Hodgkinson & Clarke, 2007). This could draw on the preliminary work by Inayatullah (1990) outlining the various epistemological premises embedded into future studies. Such critical analysis is rare within the scenario planning literature and not cohesive when present within the futures publications.

7.3.3 *Drawing on Existing Liminal Practices*

Research conducted in programs that are already drawing on liminal concepts is encouraged. Several rites of passage models already being practiced in schools, colleges and personal development arenas (AdventureWorks WA, 2017; Bell, 2003; ManKind Project Australia, 2018; Rubinstein, 2013). These programs are iterating their own insights on this subject, through lived experiences, and have many contributions to make to the emerging understanding of intentionally designing and facilitating liminality.

Attention to other practice-orientated theories may assist to build a more comprehensive body of designing liminality. Liminal theorists are not isolated in recognising the potency of a three-phase framework of change with other three-tiered theories present in psychology and change management. Future research could further the synchronistic and valuable ways tripartite frameworks of change can inform each other. Lewin's change model involves first creating an awareness

that change needs to occur - unfreezing structural norms or separation. Second, moving towards a new space – change or liminality – and third, embedding new practices, behaviours and beliefs as the norm (Lewin, Long & Carroll, 1999). An in-depth explanation or comparative analysis of models like Lewin’s change model was beyond the scope of the current project but nonetheless is recognised as being relevant to the current study and future research (Bradbury & Lichtenstein, 2000; Howard-Grenville et al., 2011; Powley, 2004).

The potential for research practices like participant observation with researcher immersion to engage in action-orientated research and learn from corporate liminal contexts has much potential for the field. Current discourse from leaders, CEOs, coaches, teachers and practitioners who are speaking publically and anecdotally about their own holistic learnings and observations indicate they have many liminal insights to offer the field (Gervais, 2019; Godin, 2019). These and other programs are increasingly adopting liminal rhetoric and it is not uncommon to find terms such as, ‘the space between’ (Burrows Grad, 2016; Kotler & Wheal, 2017; Lewis-Kraus, 2012). Successfully harnessing and learning more about this space ‘in-between’ will require a narrowing of the gap between academia and practice, thus facilitating beneficial learning for all.

7.4 Study Conclusion

This research examined the intentional engagement with designed liminality. Considerable attention was given to analysing the psycho-social concerns of participants. This resulted in a full analysis of the psycho-social tools involved with creating future-orientated knowledge. Holistic intelligence is situated as an essential component of designing, preparing, interpreting, negotiating and facilitating groups.

This research aimed to move away from discourse directly or indirectly arguing that achieving organisational goals requires manipulation to leverage group energies. It is possible to facilitate without disempowering or manipulating participants (Beavitt, 2012; Beech, 2011; Bell, 2003). The capacity that practitioners have for adjusting their approach amidst action is not purely a methodological element. Scenario planning facilitators will be consciously and unconsciously influencing, harnessing, and deflecting energy towards organisational aims and objectives (Simpson, 1992).

It should have been apparent from the outset that focusing on the emergence of what Scharmer (2009) terms “disembodied knowledge” would take some time to embody and articulate. Creating new knowledge that has not previously existed requires being open to the future without predicting or defining the outcomes in advance. This is distinct from much of the business programming we are accustomed to. Building a deep understanding of designed liminality will take effort from academics and practitioners alike. The opportunity exists for both theory and practice to co-exist as we expand our understanding of what is possible in the psychological, social and innovative realms (e.g. Kotler & Wheal, 2017).

As this voyage to bridge the gap between liminal theory and practice comes to an end, it is apparent that the map given to a traveller preparing for a journey is never an exact representation of the territory that will be visited. As with any journey, the precise understanding, experiences and stories of the traveller will forever be unrealised by the designer of the map. As soon as the map leaves the hand of the designer, roads will change, new paths will be created. Alternatively, a traveller will encounter rough seas on the most popular route, only to discover that a new route has become available. The map may be discarded completely. A new path will be mapped, or some voyagers may decide to take to the road without

a map. Such detours lead to unexpected insights that would never have been realised otherwise following the precise design provided. Regardless, with a map in hand, one's experience can also be more direct, more profound, and more deliberate while leaving *some* room for the uncertain, ephemeral chance and magic. Indeed, these components are the very aspects that make a space liminal.

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Appendix

Appendix 1: Participant Information and Consent

Strategic Management Planning Project for *Services Ltd.* **Information and consent**

This is the first step in a three-stage project conducted by Prof Peter McKiernan from Murdoch University as part of the *Services Ltd.* strategic planning and as part of his research. Each stage feeds into and informs subsequent stages as follows:

Stage one a Delphi study – Stage two a scenario planning study – Stage three the development of a strategic plan.

Each stage builds on the various levels of Senior Management expertise to ensure a cohesive body of thinking about the organisation's future.

Stage one the Delphi study

In this instance your participation and consent is sought for the Delphi study. The Delphi technique, developed by the Rand Corporation (a strategic think tank) in 1957, is a consensus seeking exercise that uses the opinions of a panel of experts (in this case, managers from across *Services Ltd.*) to address issues or solve problems for which they have specific expertise.

Delphi deliberately avoids face- to- face contact to eliminate biases that can occur in conventional face-to- meetings; such as status differences, hidden agendas, dominant personalities, or aggressive behaviour. Usually, it is conducted electronically over two to three rounds where a series of questions are posed seeking expert opinion.

Each round builds on the combined expertise of the panel. Delphi is well documented in the academic literature and consulting practice as an effective process. Individual experts are not identified in terms of their responses.

The process follows five steps as below:

1. An issue or a problem is addressed, in this case the need to assess the past, present, and future strategic direction of Services Ltd.
2. A panel of experts is identified; in this case a group of 60 managers from a cross-section of areas across the organization. Independent judgments are obtained from each expert, in this case by email.
3. An intermediary facilitator collects, codes and summarizes the findings through a content analysis and feeds it back to each expert for further consideration.
4. Steps 3 and 4 are repeated until consensus is reached, usually within 2-3 rounds.

This study is intended only for those invited to participate and should not be distributed further.

If, after reading the information above together with the information from, you agree to participate, all you need to do is to respond to the following questions.

Should you change your mind, you are free to stop or withdraw at any time. Once the researcher receives information, the data will remain anonymous and will be integrated into a global analysis as quickly as possible. After which point it will no longer be feasible to withdraw any of the information provided. However, it will be possible for additional information to be provided as part of the further rounds of the Delphi study.

ROUND ONE: Questions

1. Based on your experience, what do you see as the key strengths of Services Ltd.?
2. Can you give examples of what Services Ltd. did well to get where it is now?
3. Similarly, can you give examples of what might have been done better as an organization to get to where we are now?
4. In your opinion, where do Services Ltd. want to be in 10 years' time relative to where it is now, as an organization?
5. In your opinion, what skill bases and innovations need to be achieved to get to the desired state in 10 years' time?
6. What risks can you envision in the future if Services Ltd. isn't prepared to change?

Once the Delphi study has reached a reasonable consensus, the data will be used in the next stage of Scenario Planning to develop scenarios for the future of the Services Ltd.

I look forward to working with you in this context.

If you want more information before you decide whether or not to participate, please email me at peter.mckiernan@murdoch.edu.au. If you do not agree to participate, you do not need to do anything, simply do not respond.

Peter McKiernan
Dean, School of Management and Governance

The Murdoch University Human Research Ethics Committee (Approval 2013/097) has approved this study. If you have any reservation or complaint about the ethical conduct of this research, and wish to talk with an independent person, you may contact Murdoch University's Research Ethics Office (Tel. 08 9360 6677 or email ethics@murdoch.edu.au). Any issues you raise will be treated in confidence and investigated fully, and you will be informed of the outcome.